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ABSTRACT

This curriculum on supported employment for individuals with disabilities is intended for case managers in Montana and focuses on programs and processes relevant to the case manager's typical roles of long-range planning, coordination, and facilitation. Part 1 discusses the move toward inclusion, including its value, the concept of normalization, and past service delivery systems. Part 2 reviews the values and philosophies of supported employment, noting differences between traditional vocational programs and supported employment and characteristics of supported employment. Part 3 is on community integration, with information on how to facilitate social interactions. Part 4 discusses the referral process, the funding of supported employment services, how vocational rehabilitation works, and funding for extended services. Part 5 presents information on consumer assessment including different assessment procedures. Various employment advocacy activities are described in Part 6. Ways to establish supportive relationships in supportive employment are highlighted in Part 7, with suggestions on meeting the unique needs and desires of families and caregivers, job coach techniques that enhance supportive relationships with families, and addressing common concerns of families. Finally, Part 8 surveys the Supplemental Security Income system and Social Security Disability Insurance program. Each chapter includes a quiz for self-evaluation. (Contains 21 references.) (CR)

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# The Ins and Outs of Supported Employment

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## A Montana Case Manager's Curriculum

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September, 1994

The Montana Supported Employment Development Project
The Rural Institute on Disabilities
The University of Montana
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# INTRODUCTION

In 1986 supported employment was in its infancy in Montana. Only 48 Montanans with the most severe disabilities were successfully working in integrated, competitive jobs by using long-term support services. They were defying the norm, surpassing expectations. By the end of Montana's first systems change supported employment grant in 1991 -- The Montana Supported Employment Demonstration Project -- 458 people were successfully working with supports--another fifty were so successful as to be able to "graduate" from ongoing supports. Clearly, new norms had been set, new expectations were rising on the horizon. Supported employment had become a permanent, salient feature of Montana's landscape.

These numbers have continued to grow. This second systems change grant, The Montana Supported Employment Development Project (MSED-II), has worked to increase access to services in rural areas, and for Montanans who experience severe learning disabilities, survivors of traumatic brain injury, and American Indians with disabilities. Barriers to services for individuals in these groups have been addressed by MSED-II in the form of education and demonstrations -- as well as efforts to address the significant funding barriers for long-term supports.

Supported employment has sent many ripples through Montana's many systems providing services to citizens with disabilities. It has altered some agency philosophies and accelerated change in others -- from VR to mental health to DDD to consumer associations, practices have evolved and relationships have changed. In the proposal for MSED-II, written in 1990, Montana promised to create a supported employment curriculum for case managers, recognizing the pivotal role they play in supported employment and community inclusion efforts for individuals with disabilities.

This curriculum, therefore, attempts to encompass those philosophies and processes most critical to the case manager's typical roles of long-range planning, coordination and facilitation. These chapters derive ultimately from *Supported Employment for Montana: Revised Interdisciplinary Curriculum*, so that information is consistent throughout the state and across the sometimes obscure boundaries of service-delivery systems. The information contained in *The Ins and Outs: A Montana Case Manager's Curriculum*, describe programs and processes from the larger perspective, thus giving case managers full opportunity to recognize those areas they can most impact.


## ACKNOWLEDGEMENTS

We honor the pioneers who developed the fundamentals of Montana's supported employment curricula and thus shaped a place for supported employment in Montana. My thanks again to Connie Ferrell (formerly Britt), to Ann Marie Chambers-Sontrop, Dan Anderson, Ed Amberg, Kelly Morse and Marie Ray for their

support and contributions, and to Sue Dalin, Diana Spas, Kathy Dwyer and Robin Wiener for their patience and the hard work they put in to help bring this project to fruition. Any errors that may yet exist in this manual are mine alone.

Special thanks to Bob Jahner, now Chief of Field Services for Montana VR. His humane and visionary guidance has steadfastly served as inspiration for eight years of systems change grants in Montana, and has truly touched the lives of many hundreds of our friends, neighbors and family members.

Dan Burke
September 13, 1994

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# TABLE OF CONTENTS


1. The Move Toward Inclusion . . . . . 1
2. Values And Philosophies of Supported Employment . . . . . 11
3. The Quality of Community Integration . . . . . 21
4. The Referral Process . . . . . 29
5. Consumer Assessment . . . . . 37
6. Employment Advocacy . . . . . 47
7. Developing Supportive Relationships . . . . . 55
8. Social Security . . . . . 65

References . . . . . 81

Answer Key . . . . . 83

## COMMONLY USED TERMS

| | | |
|---|---|---|
| ADA | = | The Americans with Disabilities Act of 1990 |
| APSE | = | Association for Persons in Supported Employment |
| DCHS | = | Department of Corrections & Human Services |
| DDB | = | Disability Determination Bureau |
| DDCPT | = | Developmental Disabilities Client Programming Technician |
| DDD | = | Developmental Disabilities Division |
| D of L | = | Department of Labor |
| DRI | = | Differential Reinforcement of Incompatible Behaviors |
| DRL | = | Differential Reinforcement of Low Rate Behaviors |
| DRO | = | Differential Reinforcement of Other Behaviors |
| EPE | = | Extended Period of Eligibility |
| FBR | = | Federal Benefit Rate |
| IP | = | Individual Plan |
| IRWE | = | Impairment-Related Work Expenses |
| IWRP | = | Individual Written Rehabilitation Plan |
| MSED-II | = | Montana Supported Employment Development Project |
| OSERS | = | Office of Special Education and Rehabilitation Services |
| PASS | = | Plans to Achieve Self-Support |
| PFP | = | Personal Futures Planning |
| SGA | = | Substantial Gainful Activity |
| SSA | = | Social Security Administration |
| SSDI | = | Social Security Disability Insurance |
| SSI | = | Supplemental Security Income |
| TWP | = | Trial Work Periods |
| VA | = | Veterans Administration |
| V-G-M-P | = | Verbal-Gestural-Model-Physical (Prompt Hierarchy) |
| VOSE | = | Virginia Office of Supported Employment |
| VR | = | Rehabilitative/Visual Services Division |
| WIN | = | Work Incentives Network |

# THE MOVE TOWARD INCLUSION

The main points covered in this section are:

1. The values of inclusion and integration;

2. The concept of normalization;

3. The past service delivery systems and beliefs that have promoted devaluation and widely held stereotypes for individuals with severe disabilities; and

4. The implication of supported employment and Personal Futures Planning which enhances community presence, choice, competence, respect, and community participation for people with severe disabilities.

# THE MOVE TOWARD INCLUSION

The Rehabilitation Act Amendments of 1992 brought together forces for change in services for people with disabilities and a newly focused perspective about the role of people with disabilities in society. Congress stated that "disability is a natural part of human experience and in no way diminishes an individual's right to ... live independently; enjoy self-determination; make choices; contribute to society; pursue meaningful careers; and enjoy full inclusion and participation in the economic, political, social, cultural and educational mainstream of American life (P.L. 102-569)." The "reauthorization," as it is commonly known, presumes each individual with a disability is able to work given the appropriate services and supports are provided--regardless of the severity of the disability.

When President George Bush signed this bill into law on October 29, 1992, The Rehabilitation Act Amendments brought together values and principles of inclusion and integration incorporated into two earlier landmark pieces of legislation--The Americans with Disabilities Act of 1990 and The Individuals with Disabilities Education Act of 1990. These three laws converge for the first time to give consistent guidance to employers, service providers and educators in how to support people with disabilities so they can more fully participate in the mainstream of their communities (Revell, 1993). All of these acts promote inclusion and integration. In addition, they reflect in these values the evolution of thought regarding the provision of services to individuals with disabilities and the roles they should play in society. These underlying principles continue to reshape services and promise to mold society further in the future--just as new perspectives over the last 25 years provided the initial impetus leading to the 1992 Amendments.

In 1971 Wolf Wolfensberger defined the Principle of Normalization as the establishment of "patterns and conditions of everyday life that are as close as possible to the patterns and conditions of the mainstream of society." In 1977 Wolfensberger further defined normalization as "the utilization of culturally valued means in order to establish and/or maintain personal behaviors, experiences and characteristics that are culturally normative or valued."

The Principle of Normalization came into existence because the majority of people with severe disabilities were placed in large institutions that were most often physically removed from major cities. In the 1800s the rationale for such isolation was to protect these individuals from the cruel and insensitive community. In the early 1900s, after years of segregation, this interpretation shifted to a need to protect the community from people with disabilities because their behaviors were perceived to be deviant and dangerous (Britt, Griffin, and Hincker, 1987). However, because of the dehumanizing treatment which many individuals were subjected to while living in institutional settings, the de-institutionalization movement was executed in many states in the mid to late 1970s. For example, in the late 1960s Boulder River School and Hospital, now the Montana

Developmental Center, had approximately 1,000 people living on grounds. Enrollment in this institution in 1991 was 190 individuals. By 1994, enrollment had shrunk to 115 individuals. In the 1970s the provision of community-based services evolved, encompassing residential and vocational services for people who had severe disabilities. This service model resulted in more normal patterns of everyday life because vocational and residential facilities were separate. However, a high degree of segregation and a lack of individuality has continued to promote devaluation, incompetence, and lack of choices.

A decline in average daily populations at The Montana State Hospital at Warm Springs began even earlier. Paralleling a national movement known as de-institutionalization, the Warm Springs campus count declined steadily after peaking at nearly 2000 in 1954. Numbers stabilized around 300 people during most of the 1980s. The causes for the decline included early, progressive use of new psychotropic drugs to treat mental illness, legislative concerns over the costs of maintaining such a large state-run facility, and increased development of short-term treatment services at Warm Springs and community-based programs throughout the state. In May of 1991, a new effort to down-size the state hospital was given further impetus by a Montana state court case, commonly known as the Ihler decision. In this suit, which ultimately became a class-action suit, the court ruled that the state hospital at Warm Springs was out of compliance with state law and its own internal policies regarding treatment rights of hospital residents. The court also agreed that the hospital was inadequately staffed to serve the number of individuals under commitment. In the compliance plan, the hospital decided to use $1 million of its budget to help regional mental health centers develop new services to support a move to downsize the institution. Thus, new and intensive community supports were put in place in several Montana communities for people experiencing mental illnesses as they were discharged from the state hospital. In addition, local mental health centers now review requests for voluntary commitments to the state hospital to determine if all community options have been exhausted. By November of 1992, Warm Springs served an average daily population of 200 people and continues to implement shorter-term treatment strategies.

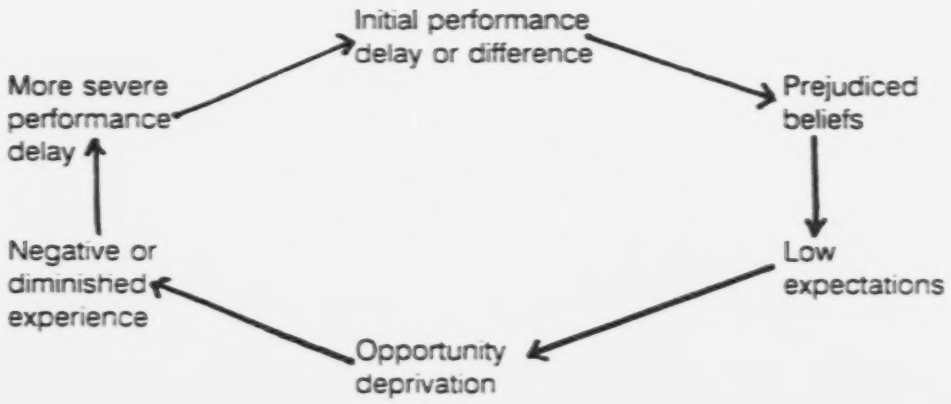
In the face of 1993's tough fiscal crisis, state funds were found to match federal money and develop a pilot Medicaid waiver program that would move survivors of traumatic brain injury from last-resort nursing homes into community settings. The language of the waiver, proposed in 1994, included use of Medicaid waiver funds to cover supported employment costs for those served in the program.

Every community establishes standards which outline acceptable individual appearance and behavior. Someone who is perceived peculiar, unfamiliar, or undesirable is frequently valued negatively. Normative refers to individuals who are typical, familiar, and who are commonly encountered in the social mainstream. Individuals who are desirable, worthy, and consistent with high aspirations are often valued positively by community members. None of the characteristics that identify a person as having a disability should keep a

person from displaying positively valued behaviors in society. An individual who has a disability can be positively valued by being well-dressed and groomed and by being employed as opposed to a person who is poorly dressed and groomed and who spends each day in a nonproductive manner (O'Brian, 1980).

Devaluation occurs when a person is seen as being different, and the differences are socially significant and valued negatively. Though devaluation begins in the eyes of others, social expectations can soon cause people to devalue themselves and act accordingly. Devaluation has two bad effects. First, many people with disabilities live down to low expectations and experience reduced opportunities. Second, negative stereotypes of people with disabilities are strengthened when other people observe their differences as well as their dependency on society. A common consequence of social devaluation is discrimination. People who are devalued are apt to be treated unfairly. Outcomes of devaluation result in poverty and individuals are often unemployed or underemployed (O'Brian, 1980). Consequently, individuals who are devalued frequently experience low self-esteem. Economic situations frequently prevent them from becoming full participating members of society as it requires money to participate in most community social and/or recreational events and to have the kind of hair styles and clothing that other people admire.

Devaluation promotes stereotypes. Stereotypes often emphasize a person's disability, and inaccurate assumptions are made about the person. It may be assumed that all people labelled paranoid schizophrenic cannot work because they will probably not get along with their co-workers, or people with developmental disabilities who may not acquire all skills quickly, will not be able to move quickly in the work environment. When devaluation occurs, people with disabilities are blocked from potential growth, and a person's label becomes a life sentence. The following illustrates the vicious circle developed by O'Brian (1980).




In many cities throughout the country, community-based services frequently accept the dynamics of this vicious circle. An individual who has a disability is usually plugged into

an existing program of service when a slot is available. A continuum of services creates a connection between the right to most opportunities and the achievement of some sort of competency. The right to a broad array of services should not be contingent upon the attainment of certain test scores or independently performing specific skills. People with disabilities should not have to earn their way to normative settings (O'Brian, 1980).

In 1983 Wolfensberger changed the Principle of Normalization to "social role valorization." This new concept states that the patterns and conditions of everyday life must not only be as close as possible to the patterns and conditions of the mainstream of society, but they must also create, support, and defend social roles in the community for individuals who are at risk of social devaluation, i.e. people with disabilities. This concept encourages the expansion of opportunities available to those who have disabilities and provides a wider array of vocational, residential, recreational, and leisure time options. This principle promotes the quality and variety of the life options people experience over time.

If a person with disabilities has not had the opportunity to develop competencies to balance obvious differences, he or she will be treated in ways that signal differences. Thus, providers of service must exert much energy teaching competencies and finding ways to utilize people's strengths so that the general public focuses on the person's abilities rather than seeing his or her differences. Providers must invest in practices which assist in the provision of increased opportunities and a variety of experiences.

Supported employment is one important component in a person's life related to the goal of inclusion and integration. Supported employment has reversed a long history of decreased expectations for work productivity. Personal Futures Planning (PFP) is a concept which attempts to join values and technology to effectively redirect traditional habilitation approaches. This concept emphasizes using supports which naturally exist in communities by implementing a planning process which identifies the following outcomes (Griffin, 1989):

1. Community Presence - does the individual share commonly accessed environments with others who do not have disabilities? What other places do individuals with severe disabilities wish to go or wish to explore? What skills and supports will be necessary for individuals to actively participate in such environments?

   The definition of supported employment ensures that individuals are afforded the opportunity to perform meaningful work in an integrated environment with employees who do not have disabilities. Supported employment provides a new social network at the work site, thus decreasing the isolation that many people with severe disabilities experience.

2. Choice - what choices does the individual make which enhances individuality? What choices are regularly made which allow control over one's life? What choices are made by others? Should they be made by others? What activities will increase the frequency and significance of choices? What choices does the individual wish to make or should learn to make?

   If an individual, through supported employment, makes more money as compared to past benefits, he or she will exercise greater decisions on how to budget and spend the money. The individual will have the opportunity to purchase new clothing that is stylish, to have his or her hair professionally cut and styled, and/or participate in additional recreational and leisure time activities.

3. Competence - what skills or aptitudes does the person have and in what environments are these skills manifested? How can new or enhanced skills be taught? What skills does this individual wish to have?

   Through on-site training, the employee often learns new work skills that are necessary for successful job performance. Having the chance to become a productive and valued employee enhances both competence and self-esteem. In addition, when working in an integrated environment, there is an increased probability that social skills will improve because of normalized expectations from workers without disabilities.

4. Respect - does the individual have a valued role in the community or a particular environment? Does the current service delivery system stereotype the individual, and thereby limit opportunities to be respected? What roles/activities does this person wish to explore? How can new activities enhance his or her respect in the community?

   Supported work provides an opportunity for the person to function in the role of a worker - a role which is valued by our society at large. When supervisors, co-workers, and business consumers observe a person with severe disabilities competently performing job duties, the individual is viewed as a respected member of society.

5. Community Participation - does the individual have friends and acquaintances in the community? Are interactions and activities similar to those of other community members? Do all friends and acquaintances have a disability? How can opportunities to build relationships be fostered?

   Through supported employment new social networks are established with co-workers. At a minimum, individuals with disabilities are invited to company functions such as Christmas parties and birthday parties.

Supported employment promotes and makes possible community presence, choice, competence, respect, and community participation. Healthy risk-taking related to work has yielded positive outcomes for individuals with severe disabilities. Such activities should enhance participation in a better and broader quality of life.

Implementation of the practices founded in the values of inclusion and integration leads staff to seek the most valued behaviors, skill acquisition, and appearance for each person served. Positive outcomes can only be defined and developed by seeing beyond a label to the many skills an individual can acquire. Thus, devaluation and widely believed stereotypes are diminished. Supported employment has demonstrated that people with severe disabilities can increase their vocational competence and elevate their status to a level which few had predicted in the past.

Thus, supported employment has plays a unique role in the move toward inclusion which has developed over the past 40 years. Increased emphasis by Congress on community presence, informed choice and career potential are likely to lead to even further changes in the future, given responsible implementation of these principles in service-delivery planning.

# THE MOVE TOWARD INCLUSION QUIZ

1. In the Rehabilitation Act Amendments of 1992, Congress found that

   A. society no longer needed to be protected from people with disabilities.

   B. individuals with disabilities should only be included in the economic mainstream after proving they could earn their way.

   C. their bank accounts were over-drawn.

   D. disability is a natural part of human experience.

2. The concept of normalization emphasizes

   A. a continuum of services for individuals with disabilities.

   B. characteristics that identify a person as having a disability.

   C. patterns and conditions of everyday life that are as close as possible to the patterns and conditions of the mainstream of society as well as the utilization of culturally valued means in order to establish and/or maintain personal behaviors, experiences, and characteristics that are culturally normative or valued.

   D. the need to protect the community from people with disabilities via segregated services because their behaviors are often perceived to be deviant and dangerous.

3. Devaluation may occur

   A. when an individual with disabilities displays positively valued behaviors which enable him or her to function adequately in the community where he or she lives.

   B. when an individual is seen as different, and the differences are socially significant and negatively valued.

   C. when an individual becomes employed and maintains employment for a two year period.

   D. when an individual leaves home and moves into an apartment with a

roommate who does not have a disability.

4. Devaluation may result in

   A. lowered expectations and reduced opportunities.

   B. increased expectations and increased opportunities.

   C. the individual being positively valued by community members.

   D. increased quality and a variety of life options.

5. Devaluation promotes stereotypes for individuals who have disabilities. Negative stereotypes often emphasize the belief that individuals with disabilities are

   A. incompetent, poor, unemployed, underemployed, and significantly different from the majority of community members.

   B. well respected and productive members of society.

   C. not at risk of being socially devalued because community members encourage their dependency on society.

   D. fully integrated into their community and are able to make choices related to employment options.

6. Social role valorization encourages the

   A. provision of a wider array of vocational, residential, recreational, and leisure time options.

   B. acceptance of current community-based services without considering the expansion of opportunities.

   C. endorsement of decreased expectations to compensate for varying disabilities.

   D. care-giver model, diminishing the dignity of risk as well as support and training experiences.

7. If a person with disabilities has not had the opportunity to develop competencies, he or she will be treated in ways that signal differences. Service providers should

   A. identify ways to protect individuals with disabilities from the cruel and

insensitive actions of community members.

B. more closely screen staff who tolerate these differences and who will promote community segregation.

C. identify and remove stigmatizing practices, find ways to develop positive characteristics, and teach competencies to people with disabilities.

D. continue to implement traditional habilitation and rehabilitation approaches and hope that community presence for individuals who have disabilities will increase the probability of society's acceptance.

8. Personal Futures Planning is a concept that

A. has redirected technology that stresses the use of scientific and external supports which enhance entrance and exit criteria.

B. has relied heavily on the developmental model for individuals who have disabilities.

C. has recently gained popularity because its theory demonstrates that a person with disabilities does not possess the capabilities to be a valued member of society.

D. uses supports that naturally exist in communities that yield positive outcomes such as community presence, choice, competence, respect, and community participation.

9. Supported employment is one important component in a person's life related to the goal of normalization because supported employment

A. utilizes wage subsidies to guarantee job placement for all supported employees regardless of their productivity.

B. guarantees that each supported employee demonstrates proper prevocational skills and prerequisite work behaviors prior to employment.

C. has reversed a long history of decreased expectations for work productivity.

D. promises employers that they will never experience an employment problem with a person who has a disability since they never call in sick or arrive late for work.

# VALUES AND PHILOSOPHIES OF SUPPORTED EMPLOYMENT

The main points covered in this section are:

1. Definitions of supported employment;

2. Differences between traditional vocational programs and supported employment; and

3. Positive characteristics of supported employment.

# VALUES AND PHILOSOPHIES OF SUPPORTED EMPLOYMENT

Employment, the opportunity to work, the process of working, and community opportunities created by earned income are critical to integrated adult lives in society. Adults with severe disabilities should and can have the same work opportunities as others in the community. While most people with severe disabilities need ongoing support to continue to perform work, this does not mean that they should be excluded from work (Leitner, 1988). Such opportunities are increasingly viewed primarily as an individual's right when developing service plans and policies.

The Rehabilitation Act Amendment of 1992 (P.L. 102-569), define supported employment as "competitive work in integrated work settings for persons with the most severe disabilities for whom competitive employment has not traditionally occurred or for whom competitive employment has been interrupted or intermittent as a result of a severe disability and who, because of the severity of their disability, need intensive support services or extended services in order to perform such work. This term includes transitional employment for persons with the most severe disabilities due to mental illness." According to the Federal Register, "competitive work means work that ... is performed weekly on a full-time basis or part-time basis, as determined in each Individualized Written Rehabilitation Program,and for which an individual is compensated consistent with the wage standards provided for in the Fair Labor Standards Act" (34 CFR 361). (Note: The requirement that individuals in supported employment also work a minimum of 20 hours per week was dropped in changes to supported employment regulations in 1992. This allows greater flexibility in developing services for individuals with the most severe disabilities, thus giving more opportunities than available under the more restrictive 20 hour requirements.)

Supported employment begins when the labor of an individual with a disability is marketed by an employer and services to the worker and/or employer are not time-limited but continue throughout the working life of that person or as long as is necessary. Creating a supported employment program as stipulated in the latest Rehabilitation Act Amendments requires that real employment be identified, each employment opportunity be developed to include all aspects of a positive work environment (income, integration with people who do not have disabilities, benefits, working conditions, etc.) as well as be in the least restrictive environment and that ongoing support services for the individual at the work site be provided to deal with physical limitations, learning difficulties, transportation and other individual and employer needs.

In 1987 a formal definition of supported employment was developed by participants at a seminar sponsored by the Rehabilitation Facility Administration Training Program of the University of Northern Colorado which included representation from Montana. The definition states: "supported employment is a consumer-oriented, integrated, and non-segregated employment which is based on the consumer's informed choice and

which provides appropriate ongoing services to an employee with disabilities in order for the individual to work productively in the community. Specifically, employees with disabilities enrolled in supported employment must (1) be engaged in part-time or full-time employment which pays wages and benefits commensurate with the individual's ability to produce goods or render services and which is based on current competitive rates, (2) need and be systematically provided the ongoing support and services necessary to maintain employment, and (3) be provided culturally normative opportunities in the least restrictive environment during the work day to integrate with people without disabilities other than those paid care-givers providing direct support services to the employee. Supported employment stresses maximizing opportunities for consumers to increase wages, benefits, integration, and independence which result in an overall increase in the quality of life." The following describes additional components concerning supported employment:

1. Individuals with severe disabilities may have characteristics of long-term mental illness, traumatic brain injury, severe learning disabilities, developmental disabilities or a combination thereof. It is important to inquire whether the disability has prevented traditional, competitive, integrated employment and if the person will need ongoing support to sustain competitive employment. Many individuals with severe disabilities have never worked in the community, or they have been excluded from the work force for a long period of time. In addition, many individuals with severe disabilities have been underemployed because traditional vocational programs have not provided proper technology or support to make competitive, integrated employment possible.

2. Integrated employment refers to employment in a regular community business in which a person with disabilities ultimately works alongside and interacts with co-workers, supervisors, and if appropriate, customers who do not have disabilities. Ideally, the number of persons with disabilities in any given work environment should never exceed the corresponding proportion of such persons in the general population. For example, approximately one percent of the population is severely handicapped. Therefore, work sites should not be overly populated by workers or groups of workers who have disabilities. Such a practice defeats the intent of integration (Brown, Ford, Nisbet, and Sweet, 1983).

3. Meaningful work is defined as a series of actions that must be performed for pay. If the activity is not performed by a person who has a disability, it must be performed by a person who does not have a disability. In work experience programs, a job may be created in which a person with disabilities assists an employee with given job duties. In supported employment, a person with disabilities actually fills a vacant position and performs job duties that have been performed by people who do not have disabilities. Meaningful work is work that enables an individual to earn prevailing wages and other normative benefits associated with working (Gold & Pomerantz, 1980).

4. Prevailing wages and benefits paid an employee with severe disabilities must be comparable to the existing wage and benefit scale offered to employees without disabilities within that business. This can include modifying wages (in accordance with federal and state labor laws) and/or benefits to reflect an employee's work productivity if it is less than employer required minimum standards. The employee must receive comparable pay for comparable work performed (Westside Regional Center, 1987).

5. Within supported employment, prospective workers need to have career choices as opposed to being placed into a job that happens to be available at that time. Ideally, a variety of jobs should be made available for a person who has a disability as well as opportunities for advancement and career changes.

6. Workers with disabilities need to have individual supports that enable them to satisfactorily perform the job and cannot be carried as charity by an employer.

7. A spirit of collaboration must be adopted by all professionals and others involved in supported employment. All parties, including family members and the business community, must work cooperatively with each other.

8. Supported employment services must be flexible. Because there is a wide range of jobs in most communities and because there are numerous ways of providing support to individuals in those jobs, supported employment cannot be limited by one or two work options.

9. Supported employment stresses jobs, not services. The emphasis is in creating opportunities for work rather than providing services to develop skills.

The following describes the differences between traditional vocational services provided to individuals with the most severe disabilities and supported employment:

| Traditional Services | Supported Employment |
|---|---|
| Segregation | Integration |
| Linear Service Model | Array Of Options |
| Evaluate-Train-Place | Place-Train-Evaluate |
| Characteristic Of Low Wages | Increased Wages |
| Success Or Failure | Life-Long Support |

In sheltered employment individuals with disabilities work predominantly with others who also have disabilities. As previously mentioned, in supported employment workers with disabilities are afforded the opportunity to work and interact with others who do not have disabilities. A linear service model or a continuum of services is based on a readiness criteria. People with disabilities must meet established criteria before they advance to

another service option, i.e. passing prevocational programming before they are ready for vocational training. An array of options refers to the fact that each worker is considered individually and is not merely placed into an existing service model which may not meet the individual's needs. There is no sequence or continuum of activities or programs, but rather alternative activities that can be arranged into supported employment options.

The evaluate-train-place approach is the philosophical base of the linear model that is the basis for the readiness technology of most traditional day programs. An evaluation identifies abilities, aptitudes, and limitations. Based on the results of these evaluations, a person is often placed in established training programs to develop work skills which often do not reflect local labor market needs. It is a well known fact that individuals with severe disabilities do not always generalize skills from one environment or situation to another. Therefore, skills that are gained may only be useful where they were taught and are not often helpful in a different job.

The place-train-evaluate approach ensures that work skills are acquired in actual work settings. The supported employment approach does not emphasize the attainment of stringent prerequisite skills prior to entering an employment situation. Instead, a person with severe disabilities is placed into a job for which he or she is well suited, provided intensive on-site training when necessary, and is then evaluated in terms of ongoing assessment and support needs to enhance employment longevity.

In the individual placement model of supported employment, the majority of supported employees make minimum wage or above. If an employee works 20 hours a week at $4.25 an hour, earnings will amount to $4,420 annually as compared to an annual income of $660 working 30 hours a week in sheltered employment. If a sheltered employee is placed into community work adjustment, resources may not always be available to provide intensive on-site training, and services are time-limited in nature. These factors may affect job retention. On the other hand, supported employment does provide on-site training and lifelong support, if necessary, so that individuals with severe disabilities may maintain employment.

More and more human service agencies are becoming involved in reviewing the outcomes of the service delivery system of which they are a part, and are more often than not, concluding that the current system is not meeting the priority needs of those individuals it was designed to serve. In addition, state and federal initiatives have begun the process of incorporating supported employment into the rehabilitation service delivery system. People and agencies are coming together to create more opportunities for individuals with severe disabilities to enter the work force.

In 1985 and 1986 the Office of Special Education and Rehabilitation Services (OSERS) administered grant monies to 27 states to promote and assist in the implementation of new supported employment services. Montana was one of the 27 states that received those federal funds creating the Montana Supported Employment Demonstration (MSED)

Project. The MSED Project, along with its two demonstration and training sites at Job Connection, Inc. in Billings and Opportunity Industries, Inc. in Missoula, were instrumental in facilitating the implementation of supported employment programs for Montanans with severe disabilities.

Montana was again funded by OSERS for three additional years of supported employment activities beginning in federal funding year 1992. The Montana Supported Employment Development Project (MSED-II) at The University of Montana's Rural Institute on Disabilities in Missoula worked to develop services further for individuals experiencing learning disabilities, who were survivors of traumatic brain injuries, and for American Indians with disabilities. MSED-II had a more rural emphasis, and focused on developing and enhancing the natural supports workers with disabilities need to maintain employment success.

In order to provide quality services, supported employment programs should conduct thorough consumer assessments, develop the best jobs possible in a community, provide a good job match between individuals who have severe disabilities and the demands of a particular job, provide orientation as well as on-site training, provide indefinite ongoing support to enhance job retention as well as provide all necessary advocacy services directly related to getting and keeping a job.

Supported employment should provide services that meet individual needs and should not attempt to merely fit the person with disabilities into the mold of existing provider programs. Supported employment services should strive to attain and maintain a high level of quality utilizing the most cost-effective means possible. Although supported employment service priorities are vocational in nature, staff must also be sensitive to the residential and social/leisure time needs of all individuals served. It is a well known fact that all facets related to quality of life directly impact the quality of job performance.

Numerous representatives of supported employment programs have observed that the best predictor of a person's ability and desire to perform a job is a chance to try it as opposed to attempting to predict job success based on a diagnosis or type of disability of the prospective employee. This approach to identifying and developing services for an individual is further reinforced by the renewed emphasis on choice in the Rehabilitation Act Amendments of 1992. Prior to job placement, supported employment staff need to be clear with employers about how a person's functional differences will affect his job performance and what steps may be taken to circumvent or alleviate any potential problems. Staff, of course, additionally emphasize the strengths and positive characteristics of the individual and the ability of the individual to proficiently carry out job duties upon the completion of training. It is also important to keep in mind that prospective employers, under provisions of The Americans with Disabilities Act of 1990, are prohibited from asking questions related to disability in any screening process. Job developers are well-advised to steer clear of such references as well, both in the interest of complying with ADA and deferring to the choices of the individual being served.

- Supported employment programs should provide people with disabilities a flexible, individualized support plan that results from the assessment of the person's needs, employer's needs, and available staff resources. In addition, the prospective employee must cooperate with the agency's in developing an appropriate support plan to acquire and maintain employment and make informed choices about accepting job coach services necessary to accomplish desirable outcomes. Supported employment programs must expect that people with severe disabilities will earn their wages and meet the employer's needs. Employers should not have to go through extraordinary efforts to hire or keep people with disabilities working, although many employers have been more than accommodating about working through problems.

Supported employment affords people with severe disabilities greater potential for personal growth and higher wages than previously experienced in sheltered programs, but there is also a much greater risk of failure in supported employment services. If individuals lose their jobs and are able and willing to work, staff should place them as soon as possible in another job for which they are well suited. However, they may not be involved in vocational services right away depending on the job market and manpower of the agency (Schilling, 1989).

Supported employment increasingly has two purposes. First, it involves the commitment of moving individuals with disabilities from traditional segregated day, vocational, and employment programs to supported participation in the community world of work. In Montana continued conversion from day program slots to participation in supported employment is of paramount importance. Second, supported employment means more and more emphasis on providing services which move an individual with a disability directly into community participation, and avoiding whenever possible placements into sheltered settings. When people with disabilities get a job, they become taxpayers rather than tax consumers which enhances their image. Employers and co-workers alike discover that employees with disabilities work productively and competitively, and the disability then becomes secondary to the attitude of acceptance. Therefore, abilities, rather than disabilities, become the focus of attention. If given a chance to work, a person with disabilities becomes an asset rather than a liability (McCarty, Fleming, Johnson, and Schultz, 1988).

# VALUES AND PHILOSOPHIES OF SUPPORTED EMPLOYMENT QUIZ

1. The federal definition of supported employment means

   A. paid work in integrated settings especially designed for at-risk workers who do not have disabilities for whom competitive employment at or above minimum wage has not traditionally occurred.

   B. volunteer work in segregated settings especially designed for individuals with severe disabilities who, because of their disability, need intensive ongoing support.

   C. paid work in integrated work settings especially designed for individuals with the most severe disabilities, for whom competitive work has not traditionally occurred or for whom it has been interrupted or intermittent and who, because of the severity disability, need intensive ongoing support to perform in a work setting.

   D. paid work in segregated work environments especially designed for individuals with severe disabilities for whom sheltered employment has not traditionally occurred and who, because of their disability, do not need intensive ongoing support.

2. According to the definition developed by the Rehabilitation Facility Administration Training Program at the University of Northern Colorado, supported employment is

   A. consumer-oriented, integrated employment which is based on the consumer's informed choice and which provides appropriate ongoing services to an employee with disabilities in order for the individual to work productively in the community.

   B. provider-oriented, segregated employment emphasizing simulated work tasks and providing indefinite sheltered employment for all individuals with severe disabilities.

   C. service-driven, integrated employment with limited options which provides appropriate ongoing services to an employee with disabilities in order for the individual to work nonproductively in the community.

   D. provider-driven, consolidated employment which is based solely on the

staff's informed choice and which provides on-site training to an employee who has a disability in order for the person to be carried as charity by the employer.

3. Prevailing wages and benefits paid an employee with disabilities must be

   A. established by the employer and are not related to the productivity of the supported employee.

   B. established on the basis of the company's profits each quarter.

   C. established at a higher rate than employees without disabilities.

   D. comparable to the existing wage and benefit scale offered to employees without disabilities in that business. The employee must receive comparable pay for comparable work performed.

4. Supported employment stresses

   A. services first and then jobs because developing work skills first is a prerequisite to employment.

   B. jobs not services because creating opportunities for employment is more desirable than merely providing services to develop skills that may not generalize to other environments.

   C. teaching a prevocational curriculum first and then advancing to vocational training.

   D. that job success should be based solely on the diagnosis and type of disability that the individual possesses.

5. Sheltered employment is often associated with

   A. segregation, a linear service model, an evaluate-train-place approach and is characterized by low wages.

   B. segregation, an array of options, a train-evaluate-place approach and is characterized by numerous community employment alternatives.

   C. integration, a linear service model, an evaluate-place-train approach and is characterized by low wages.

   D. segregation, a linear service model, a place-train-evaluate approach and is

characterized by high wages.

6. Supported employment is often associated with

   A. integration, a continuum of service, an evaluate-train-place approach, increased wages, and time-limited services.

   B. integration, an array of options, a train-place-evaluate approach, low wages, and lifelong support.

   C. segregation, a linear service model, a place-train-evaluate approach, increased wages, and time-limited services.

   D. integration, an array of options, a place-train-evaluate approach, increased wages, and lifelong support.

7. Components of supported employment often include

   A. prevocational training, vocational training, performing contract work, and possible placement into a job.

   B. developing a continuum of services establishing criterion based on the readiness model and assisting consumers to graduate from one option to another.

   C. conducting thorough consumer assessments, developing the best jobs possible in the community, providing good job matches for individuals with severe disabilities, providing orientation placement and on-site training, providing ongoing support, and all necessary advocacy services related to getting and keeping a job.

   D. conducting thorough consumer assessments, developing the best jobs possible, providing good job matches for individuals with severe disabilities, and providing job orientation related to company policies and procedures.

8. Supported employment staff must expect that people with severe disabilities

   A. will earn their wages and meet the employer's needs.

   B. will earn minimum wage or above even if they cannot perform their job to the employer's standards.

   C. will only work at their own convenience and therefore, should always be

accommodated with a flexible work schedule.

D. should be carried as charity by a compassionate employer.

9. Supported employment involves

A. the commitment of moving individuals with disabilities from work activity centers into sheltered workshops.

B. the commitment of moving individuals with disabilities from sheltered employment to segregated employment.

C. the commitment of moving individuals with disabilities from traditional segregated day, vocational, and employment programs to supported participation in the community world of work.

D. the commitment of moving individuals with disabilities from real jobs in the community to more protective environments such as sheltered employment.

10. Employers and co-workers alike discover that employees who work productively and competitively may also have a disability. Based on this observation

A. abilities rather than disabilities become the focus of attention.

B. disabilities rather than abilities become the focus of attention.

C. individuals with severe disabilities should not be afforded the opportunity to work.

D. individuals with severe disabilities should be afforded the opportunity to work only under special circumstances.

# THE QUALITY OF COMMUNITY INTEGRATION

The main points covered in this section are:

1. Aspects of physical and social integration related to supported employment;

2. The job coach's responsibility in facilitating social interactions between the supported employee, co-workers, and supervisors; and

3. Dealing with inappropriate social behaviors through role playing.

## THE QUALITY OF COMMUNITY INTEGRATION

The definition of supported employment ensures that the employee with a disability is afforded the opportunity to perform meaningful work in an integrated environment with peers who do not have disabilities and is paid consistent with prevailing wages. Community employment should include both physical and social integration. The mere physical presence of the worker with disabilities in a work setting cannot constitute total integration. The job coach should not actively seek self-contained job positions that require little or no interaction between co-workers, supervisors, and the employee (The Virginia Office of Supported Employment [VOSE], 1986). However, this situation may not always be avoided if a person desires to work evening hours or if the physical layout of the business requires a person to work in a fairly isolated area.

Integrated work setting, according to federal regulations, means a setting in which:

- most employees do not have disabilities,
- an individual with the most severe disabilities interacts on a regular basis, in the performance of job duties, with employees who are not disabled,
- if an individual with the most severe disabilities is part of a distinct work group of only individuals with disabilities, the work group consists of no more than eight individuals.

In Montana, many competitive work opportunities for people with the most severe disabilities are found with very small employers. In the instance where an individual works alone or there are no other employees, federal regulation require "an individual with the most severe disabilities interacts on a regular basis, in the performance of job duties, with individuals who are not disabled, including members of the general public." This stipulation also applies to individuals who work in a work group, such as an enclave or mobile work crew (34 CFR 77.1).

Supported employment does not guarantee the social integration of workers with severe disabilities. The job coach must realize that his or her presence at the work site may additionally stigmatize the employee with disabilities as different (VOSE, 1986). The job coach must decide, with understanding and consent of the worker, whether it will be appropriate to explain his or her role to all co-workers and supervisors. The job coach must understand that intervention at the work setting may, in some ways, be interpreted as an artificial intrusion into that particular environment. Intrusion can be minimized if the job coach has established a positive working rapport with co-workers and supervisors during the job analysis phase. For example, during the job analysis phase, if the job coach is performing food preparation duties, he or she should mesh into that particular environment by dressing like co-workers and adhering to all formal and informal rules of the company.

During on-site training the job coach needs to ensure effective communication between the employee who has a disability and co-workers and supervisors. When necessary, the job coach should teach the new employee how to properly greet co-workers when arriving at work. The job coach could facilitate conversational topics to enhance comfort and ease for the new employee and co-workers during breaks and meal times. In one instance during lunch, a co-worker spoke of a high school football game that took place the night before. Brad, the new worker, had also attended the game. After the co-worker's comments, the job coach asked Brad what he thought about the game. As Brad began to express his thoughts, he and the co-worker continued to talk about the events that took place during that game. The job coach is an important role model for co-workers and supervisors who have never worked with a person with disabilities. If the job coach's interactions with the new employee are positive and respectful, it is likely that the employee's peers at work will engage in similar types of interactions.

While many consumers benefit from intensive on-site training, many others may choose or be better served by alternative forms of training or long-term supports. Promoting co-worker supports, or natural supports, may be one option the job coach or employment specialist explores with the potential employee. The '92 Amendments to the Rehabilitation Act make allowances for such choices on the part of an individual with a disability and professionals with whom he or she works. Researchers have recently become concerned that the job coach's presence may actually impede the socialization process of a worker with a disability in a given work setting, thus potentially becoming a barrier to true integration (Yan, Mank, Sandow, Rhodes & Olson, 1993).

During the job analysis phase, the job coach will identify those co-workers and supervisors who enjoy training and providing other kinds of supports for new employees. Whenever possible, the job coach may capitalize on the positive traits these people possess when placing an individual. During the initial stages of work skills training, the job coach should monitor and encourage supervisors and co-workers to provide effective prompts and feedback to the supported employee. In some cases, it may be appropriate to demonstrate such positive feedback.

In turn, the supported employee should be encouraged to ask questions or seek assistance from supervisors or co-workers when it is appropriate to do so. The sooner this type of communication is implemented, the sooner everyone will feel comfortable in interacting and working together. The job coach should provide reinforcement to all staff who effectively interact with the new supported employee. If the job coach communicates and interacts solely with the new worker, he or she may be fostering dependency on his or her external supports. It is critical to facilitate social interactions between the new employee and company staff from the employee's first day on the job. It is also important to begin leaving the new worker on his or her own the very first day, if only for five minutes or so, to begin to accustom him or her to working and interacting solely with co-workers. This also enhances opportunities for co-workers to begin providing supports to the new worker themselves.

Depending on the disability of the individual being placed, the job coach may find it necessary to spend a minimum amount of time teaching actual work skills and more time providing consultation to supervisors and co-workers directly related to the employee's abilities and needs. This is especially true for individuals with long-term mental illness, learning disabilities, or survivors of traumatic brain injury. When on-site, the job coach should also closely attend to informal rules and expectations initiated by company employees. For example, if workers informally take turns making coffee, the supported employee should be taught to perform this skill as well.

If the job coach is involved in the individual model of supported employment, visits to the work setting must gradually be reduced once the supported employee consistently and proficiently performs all aspects of the job according to the employer's standards. Prior to doing so, the job coach must ensure that all co-workers and supervisors feel comfortable in providing effective prompts and feedback to the worker when necessary. It is the job coach's goal that positive social interactions and working relationships occur for the supported employee, co-workers, and supervisors. It is extremely important that supported employees are competent at what they do so other employees like them and like to work with them. This is why it is important that placements are not built on charity, but on a person's ability to perform a valued function at the place of business.

In most cases, personal bonds do take place at work. Sometimes, friendships form between two or more people who work together and choose to spend time together outside of work. However, there are people without disabilities who frequently interact with their peers at work but who have no interest in socializing with them outside of work. From a realistic standpoint, supported employment providers cannot always expect the people they place to form friendships at work which carry on outside the work setting. Providers need to concern themselves with the fact that supported employees like or at least get along with the people with whom they work since this is an important component related to job satisfaction.

The issue of social interaction cannot be perceived as an optional feature because it is critical to any worker's job success and retention. Many supported employees have been terminated from their jobs because of inappropriate social behaviors versus not being able to perform job duties to the employer's expectations (Wehman, et al., 1985). Studies indicate that an effective way to deal with inappropriate social behaviors which occur at work is to simulate those specific situations into role play sessions off-site. Role play situations will allow the supported employee to respond in alternative and acceptable ways in the future when facing similar situations.

From initial training, the job coach needs to avoid being totally occupied with teaching the supported employee how to competently perform all job duties. He or she should be aware of opportunities from the first to facilitate communication and interactions between the supported employee, co-workers, and supervisors. The job coach needs to begin cultivating natural supports which could be provided by a number of employees in the

work environment. He or she should emphasize the significance of the work place culture as it relates to unwritten rules, jargon, and informal work-related expectations. All of the above elements enhance the quality of integration in a community work setting, which in turn, directly impacts job satisfaction and job retention.

## COMMUNITY INTEGRATION QUIZ

1. During the job analysis phase of supported employment, the job coach should

   A. attend solely to the work tasks at hand and disregard social interactions with co-workers.

   B. continually remind co-workers who the job coach is, that the work being performed is beneath him or her, and that he or she is glad this situation is only temporary.

   C. inform the supervisor which co-workers are not pulling their weight.

   D. mesh into the work setting as much as possible and establish a positive working rapport with co-workers and supervisors.

2. The job coach is an important role model for co-workers and supervisors who have never worked with people who have disabilities. If interactions with the supported employee are positive and respectful, it is likely that other employees will

   A. laugh at and scorn the job coach.

   B. engage in similar types of interactions with the supported employee.

   C. avoid the job coach and supported employee at all costs.

   D. engage in very different types of interactions with both the job coach and the supported employee.

3. When co-workers and supervisors provide effective cues and feedback to the supported employee, the job coach should

   A. become resentful because, after all, this is his or her job.

   B. ignore such behavior.

   C. reinforce staff for initiating such interactions.

   D. walk off the job.

4. In addition to teaching the supported employee how to proficiently perform all job duties, the job coach should also

   A. teach the worker to brown nose the supervisor so he or she can perform less work.

   B. teach the worker how to color in a coloring book during breaks.

   C. teach the worker how to sit and not initiate other work tasks during down time.

   D. teach the worker how to carry out work-related duties such as taking a turn emptying the trash from the break room.

5. According to Paul Wehman (1985), a large percentage of supported employees have lost their jobs because

   A. the disability of most individuals prevented them from being reliable employees.

   B. all people with disabilities arrive to work late.

   C. they exhibit inappropriate social behaviors.

   D. they have job skill deficits.

6. One effective technique in dealing with inappropriate social behaviors is

   A. to ignore the problem in hopes that it will go away.

   B. to conduct role play sessions addressing specific problem areas at work which will teach the supported employee how to respond in alternative, acceptable ways at the work site.

   C. by using medication to sedate the supported employee.

   D. to have the supported employee check out books at the city library related to interpersonal interactions.

7. To enhance the quality of integration in a community work setting, the job coach should

   A. beg co-workers and supervisors to take the supported employee to a movie.

B. encourage co-workers and supervisors to have pity on all people with disabilities.

C. cultivate natural supports in the work environment, inform the supported employee about informal, work-related expectations, unwritten rules, jargon, and so forth.

D. encourage family members to check on the supported employee on a daily basis.

8. Positive social interactions with co-workers and supervisors have a direct impact on

A. job satisfaction and job retention.

B. increased wages for the supported employee.

C. the attainment of additional days off for the supported employee.

D. profits earned by the company.

# THE REFERRAL PROCESS

The main points covered in this section are:

1. How supported employment services are funded; and
2. How vocational rehabilitation (VR) works
3. The referral processes for supported employment services.
4. Funding for extended services

# THE REFERRAL PROCESS

The cardinal rule of referral for supported employment in always to promote and observe the highest level of interagency cooperation, communication and coordination. At different times many different agencies can be involved in the process of referral, assessment, funding and development of ongoing supports services. The missions of each agency do not always coincide one hundred percent. But in the area of inclusive, competitive work opportunities tremendous opportunities for cohesion and success abound.

In its design, the supported employment program has two essential phases. In the first phase, activities such as consumer assessment, referral, eligibility for various programs, job development, placement and initial training occur. This phase is often intensive in terms of the level of professional intervention. The second phase is the long-term phase which comprises supports provided to a worker in order to maintain the desired employment. This phase, often less intensive in terms of professional intervention, is known as ongoing support services or extended services.

The two phases of supported employment are also defined by funding sources. Typically, vocational rehabilitation (VR) funds are used to pay for services in the first phase of supported employment since, by its definition, VR is a "time-limited" program. Funding for the ongoing service phase, therefore, must be come from some source other than the state/federal money that VR uses to provide employment services.

Supported employment services, therefore, necessitate a great deal of cooperation and mutual understanding between diverse agencies, programs and educational facilities--as well as consumers and family members--to ensure that an individual receives the best possible services to support them in reaching for their employment and personal goals.

Referral for supported employment services most often includes referral to Montana's VR program (Rehabilitation/Visual Services Division of the Montana Dept. of Social and Rehabilitation Services). Anyone can contact the VR system to see if they are eligible for supported employment services. A VR counselor will guide them through the eligibility process. The candidate must become eligible for VR services under the state/federal guidelines for that program, and be determined to be an individual with "the most severe disability." At that point, the VR Counselor and the eligible individual with a disability begin development of the Individualized Written Rehabilitation Program (IWRP), which defines the person's goals and the services necessary to help him/her achieve them. The VR counselor will also ensure that ongoing support services will be responsibly provided.

An individual is eligible for VR services if:

1. the individual has a physical or mental impairment which constitutes or results in a substantial impediment to employment and the individual can benefit in terms of

an employment outcome from vocational rehabilitation services; or

2. the individual is blind or has a disability and is eligible to receive Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI). (These individuals are also considered to have severe physical or mental impairments which seriously limit one or more functional capacities in terms of employment outcomes.)
3. The individual requires vocational rehabilitation services to prepare for, enter, engage in or retain gainful employment.

The VR counselor uses existing medical and/or psychological records to establish eligibility for its services. Determinations made by officials of other agencies regarding whether an individual has an impairment which creates a substantial impediment to employment will be used to the extent appropriate, available and consistent with eligibility requirements. VR will also use information provided by the individual and the family to the extent it is appropriate.

In addition the 1992 Amendments to the Rehabilitation Act introduced the concept of "presumed disability" and "presumed benefit." Presumed disability refers to an individual who has a disability or is blind and is therefore receiving SSI or SSDI benefits. Such an individual is considered to be an individual whose disability constitutes a substantial impediment to employment. The VR counselor may then complete the certification of eligibility and proceed with further assessments.

"Presumed benefit" means that VR considers a person capable of benefitting from VR in terms of a positive employment outcome. Only if it can be demonstrated by clear and convincing evidence that an individual is incapable of benefitting from VR services can an individual be considered to be ineligible for the VR program.

The VR counselor performs a comprehensive assessment of rehabilitation needs for each individual who receives services. This assessment focuses on the unique strengths, resources, priorities, interests and need for supported employment. The assessment may include the following:

- personality
- interests
- interpersonal skills
- intelligence and related functional capacities
- educational achievements
- work experience
- vocational aptitudes
- personal and social adjustments
- employment opportunities
- medical, psychiatric and psychological factors
- therapeutic recreational services
- the need for rehabilitation technology.

The VR counselor will consider any other information which may help in planning for services. Such information, such as vocational, educational, cultural, social, recreational, and environmental factors, may be provided by other programs and professionals, past employers, educators and especially family and friends who know the person best.

The assessment may include an appraisal of the patterns of work behavior and services needed for the individual to acquire occupational skills, and to develop work attitudes, work habits, work tolerance, and social and behavior patterns necessary for successful job performance. It may include use of work in real job situations to assess and develop the capacities of an individual to perform adequately in a real work environment. (See section titled "Consumer Assessment.") Referral to other appropriate assessment resources is also likely.

As part of the comprehensive assessment of rehabilitation needs, a VR counselor must determine that an individual with a disability is a person with "the most severe disability." Most severe disability is defined as follows:

1. An individual who meets eligibility which seriously limits one or more functional capacities (such as mobility, communication, self-care, self-direction, interpersonal skills, work tolerance or work skills) in terms of an employment outcome; and

2. whose vocational rehabilitation can be expected to require multiple core services over an extended period of time and

3. who will require ongoing support and other appropriate services to maintain employment following VR closure.

The most important document in the VR program is the Individualized Written Rehabilitation Program (IWRP). Like many of its counterparts (IEP, IP, and so on), the IWRP is jointly agreed upon between the individual with a disability and the VR counselor. It is the document of record for services to be provided. It identifies an individual's work goals, intermediate steps to reaching those goals, what services will be provided and who will pay for them in order to assist the individual in achieving their goals.

While the availability of ongoing support does not enter into the determination of eligibility, the VR counselor must identify either the source of ongoing support or the potential to identify that source, in the worker's IWRP. Therefore, in practice, both the up-front funding from VR and the ongoing funding from elsewhere must be in place or be reasonably expected to become available in order for supported employment services to be provided. It is the VR counselor's job to secure this commitment and to make a statement regarding it in the individual's IWRP. Typically, the VR counselor will consult the local chairperson for the Case Managers' Coalition.

Three primary sources are available to fund extended, or long-term, supported

employment in Montana. Rehabilitation/ Visual Services Division (VR) manages a fund of state dollars known as VR Extended Employment. Originally VREE was designed to place individuals into sheltered employment if their severe disabilities did not meet the requirements for The Developmental Disabilities Division (DDD). Like DDD, VR began to use this money to support community-based, integrated employment. DDD also pays for long-term supports, and The Department of Corrections and Human Services (DCHS) provides long-term supports through their contracts with the mental health centers. Each of these agencies has a process for determining who is eligible for services.

Other funding sources may be used as well, such as Social Security Work Incentives (Impairment Related Work Expense and Plan for Achieving Self-support). Private fund-raising and other public sources may also be options (see "The Funding Book" published by The Montana Supported Employment Development Project, 1994, and "Resources for Long-term Support in Supported Employment," The Employment Network, The University of Oregon, 1994).

DDD determines an individual's eligibility for services they purchase using the following definition of developmental disabilities: "Developmental disability refers to disabilities attributable to mental retardation, cerebral palsy, epilepsy, autism, or any other neurologically handicapping condition closely related to mental retardation and requiring treatment similar to that required by mentally retarded individuals. The disability must originate before the person reaches 18, continue or be expected to continue indefinitely, and it must constitute a substantial handicap to the individual." DDD uses psychological assessments and past school or medical records to help make their eligibility determinations.

If an individual is already involved in the DD community based system or the school district, the Individual Planning (IP) team or the Individual Education Planning (IEP) team will determine appropriate services for referral. Individuals new to the system are referred for the services most appropriate to meet their needs in the community and they are placed on the appropriate waiting lists.

DDD purchases models of supported employment such as individual placement, enclaves or mobile work crews through the same contract as they purchase work activity or sheltered employment from non-profit corporations. They coordinate with the VR system to purchase supported employment in places where both DDD and VR have contracts with the same non-profit agencies. DDD can purchase all phases of supported employment from job development through follow-along services.

Agencies who have contracts with both VR and DDD are referred to as joint vendors. Before a person receives services, the eligibility requirements of both DDD and VR must be determined, and both systems must have money to purchase the services if the joint vendor arrangement is being utilized. In the DDD system, people must be accepted into a service through a screening process when there is an available opening. If the VR

system is not involved in paying for services, the VR processes do not have to be followed. ***However, job coaches should always make sure that a worker is not already referred to VR and in the eligibility or planning process with a VR counselor before proceeding without VR input. Again, good communication and coordination make the referral process most effective.***

DCHS uses case management dollars to purchase extended services after VR funding has paid for the initial job development and placement. The VR system purchases supported employment through job coaches located in mental health centers or, in some cases, from a joint vendorship agreement that they have with another agency providing supported employment. The mental health system is the extended service provider for services after the VR system closes the case. Again, the important focus is that both up-front funding and extended services funding and eligibility requirements of both agencies are coordinated.

Given the apparent complexity of various systems, it is most useful to understand that VR typically is the first place an individual may need to go in order to become eligible for supported employment services. The VR counselor's role is a critical one when it comes to determining what an individual will need in order to reach their work goals. Case managers, whether professional or family members, can provide critical information in the processes of eligibility, assessment and planning for supported employment services.

# THE REFERRAL PROCESS QUIZ

1. The supported employment effort in Montana is

   A. funded through large federal grants.

   B. funded through a variety of agencies.

   C. is going to go away.

   D. is the result of the Graham Rudman Amendments.

2. VR

   A. relies on the VR counselor to ensure that ongoing supports are identified in the IWRP.

   B. provides supported employment for the lifetime of the placement.

   C. is a federal agency that only provides services to people without a need for supported employment.

   D. has a federal mandate requiring them to serve anyone who desires supported employment.

3. DDD

   A. only purchases supported employment if the VR agency does not.

   B. purchases supported employment through a variety of agencies and through more than one contract appendix.

   C. uses case management to determine eligibility.

   D. only provides residential services in Montana.

4. People with long-term mental illness

   A. cannot be referred to the VR system as the Mental Health system is responsible for them.

   B. may receive services even if agencies do not have any more money set aside to purchase supported employment.

C. may receive time-limited services through VR and the Mental Health system may provides extended services.

D. do not have to have an ongoing source of support.

5. Eligibility

A. is consistent among all purchasers of supported employment so that anyone who is eligible in one agency is grandfathered into the other agency.

B. is not important.

C. requires a Ph.D. in physics.

D. is determined by different procedures for each agency that provides money for services.

6. The key to ensuring the best supported employment services for an individual in Montana is:

A. let the VR counselor figure it all out.

B. cooperation and coordination between agencies, consumers and family members.

C. placing him/her in the first minimum-wage job that comes along.

D. sending copies of everything in the individual's existing case file.

# CONSUMER ASSESSMENT

The main points covered in this section are:

1. Agency referral procedures;

2. The definition of consumer assessments and different assessment procedures;

3. Activities and objectives that need to be accomplished during the assessment phase;

4. Vocational profiles; and

5. Career planning.

# CONSUMER ASSESSMENT

Consumer assessment is an organized and comprehensive evaluation of a person's interests, capabilities, behaviors and limitations which are relevant to his vocational potential. A thorough understanding of the prospective worker's functional characteristics and personal preferences will be of considerable assistance in planning the optimum placement for workers with severe disabilities. Consumer assessments are necessary when determining the severity of the disability and eligibility for appropriate services.

The screening process refers to an assessment procedure of limited scope and intensity designed to determine whether or not further evaluation or other intervention is indicated. Examples may include auditory screenings, vision screenings, and nutritional screening.

Evaluation refers to an assessment process performed by professionals according to standardized procedures that incorporate the use, when possible, of standardized tests and measures. For example, psychological evaluations administer numerous test batteries measuring intelligence and achievement capabilities. Both VR and DDD require psychological evaluations which verify the existence of a defined, severe disability which in turn determines eligibility for services.

Functional behavior checklists are another assessment procedure which objectively identify the strengths and needs of individuals across varying behavioral domains. There are different tools and instruments that can be utilized to assess vocational skills, residential/daily living skills, community mobility skills, recreational/leisure time skills, social behaviors, etc. Such assessments are often designed as checklists or rating scales.

Many agencies may have a referral pool identifying prospective workers with the most severe disabilities who are candidates for supported employment. Prior to conducting consumer assessments, agency personnel must make sure that the referred individual is eligible for appropriate services, such as vocational rehabilitation. Agencies providing supported employment may encourage the referring agency to complete their standardized referral forms.

Consumer assessment involves meeting with the referred individual to explain supported employment, obtaining pertinent information from the individual and significant others regarding employment, and thoroughly reviewing the individual's past records. If possible, observations of the individual in various environments should be completed and others who know the individual well should be interviewed in order to more extensively identify the person's current interests, abilities and needs related to getting and keeping a job. Strong emphasis should always be given to the individual's stated vocational preferences and goals as a part of any effective assessment process.

Once the individual has been deemed eligible for supported employment services, the

job coach needs to schedule a meeting with the prospective worker and, when appropriate, family members, case managers and/or teachers. During this intake interview, the following objectives should be accomplished:

1. An in-depth explanation of the services, roles and responsibilities of the agency should be provided.

2. All pertinent/referral information (demographic data) necessary for the provision of services needs to be obtained.

3. The individual's or guardian's permission should be obtained to release information necessary to make informed decisions on employment options. Agencies or individuals possessing important information about the prospective worker may include DDD, VR, SSA, school districts, mental health centers, the involved psychologist and/or physician, residential/day programs, past employers, and personal references.

4. A social assessment should be completed and should include information regarding the individual's current living situation, mode(s) of transportation used, current income/benefits/resources, the individual's willingness to risk benefits if a job becomes available, motivation to work, past education and training, employment history, references, interests and hobbies, household responsibilities, job preferences and dislikes, willingness or lack of willingness to work for minimum wage, limitations which may affect job performance, and family support.

5. A consumer screening of the prospective worker's current abilities/aptitudes and limitations which may have an impact on employment should be completed. In other words, the job coach must begin to identify "functional limitations" of the worker. This process is similar to that which the VR counselor completes when determining eligibility for supported employment. These processes may overlap and complement each other. In addition, knowledge of functional behaviors will be required to perform effective job development later on. A widely used screening form contains 29 factors such as availability to work, travel to and from work, strength, endurance, speed, task completion, initiation, adapting to change, reinforcement needs, supervision needs, learning styles, mobility, appearance, communication, interactions, interfering behavior, and discretion.

6. The job coach should discuss realistic vocational goals and the scope of the agency's services. For example, if a prospective worker has a strong yearning to be a cosmetologist, but needs the necessary education to accomplish this goal, the job coach should refer the client to VR. It may not always be possible for someone who is experiencing long-term mental illness or a traumatic brain injury to perform the same type of work as prior to the onset of disability. A prospective worker may need to make an informed choice as to whether initially accepting

entry level positions is a necessary step to establishing a new work history.

7. Inform the individual that two forms of identification (one picture I.D.) are necessary if job placement occurs, in order to comply with federal regulations.

8. Inform the individual that the agency may not be able to find a job right away, and provide realistic time frames for possible job placement.

9. Identify long-range vocational and personal goals to gain an understanding of the individual's career directions and to begin to develop a vocational profile.

10. At the close of the meeting, requests for information should be sent out to obtain all evaluation/assessment data concerning the individual. Many agencies throughout the country have developed a variety of forms to facilitate gathering consumer information. (Sample forms are at the end of this section).

The location of an intake interview may vary depending on the prospective worker's preference. Meetings may take place at school, at the case manager's office, or at a place of residence. Consideration should be given to meeting where the individual feels most comfortable. If it is important for the consumer to develop a relationship prior to divulging information, the job coach may meet informally with the consumer at a restaurant or other public setting prior to the meeting. Developing trust and a working rapport is extremely important to most individuals.

During the assessment phase, the job coach should conduct separate interviews with parents, case managers, teachers, counselors, direct care staff, advocates, and others who know the prospective worker well. These individuals can verify the accuracy of information gathered on the social assessment and screening form. They may be able to provide supplemental information regarding the consumer's personal characteristics, aptitudes, and abilities. Is the individual shy or outgoing; messy or orderly; someone who takes initiative or responds best when spoken to; easy going or easily upset; neat in appearance or unkempt? Does the individual have good coordination, fine motor dexterity, discrimination skills, receptive/expressive communication, reading/math skills, and so forth? The individual's hobbies and leisure time activities may also help identify career interests. Does the individual exhibit behaviors that may interfere with work or that would not be acceptable in most work environments? Does the individual have physical/health restrictions that may create challenges for some types of jobs? When possible, the job coach may observe the consumer in a variety of settings such as day programs or schools, at home, during recreational activities, etc. Such observations may provide even more information about the individual in relation to potential employment.

Individual preferences also give important clues as to what jobs or type of jobs in which a prospective worker may be most likely to find satisfaction and success. Does the worker prefer working in a mixed or same gender work environment; like outdoor or

indoor work; prefer to do strenuous or sedentary activities; enjoy a great deal of activity in the environment or prefer a quieter, more controlled atmosphere? Several simple vocational preference instruments are available. Some, such as the Wide Range Interest and Occupational Test (WRIOT), have been developed for non-readers.

The job coach should thoroughly review the individual's past records and evaluations as soon as they are received. Past records frequently contain valuable information which may effect the individual's future employment. When reviewing the records, the job coach should focus on past history. Where has the individual been? What critical things happened in life that the person is here today? Evaluations may provide important information about the prospective employee's preferred learning style. For example, if the individual is legally blind, verbal instruction and physical assistance are necessary to perform a job task. Background information may define behaviors that have occurred in the past. For example, what happens when the individual stops taking medication as prescribed? Background information will indicate other people's opinions about the vocational strengths and needs of the individual.

On the other hand, job coaches need to concern themselves with assessment validity. For instance, one-time-only testing which measures the occurrence of behaviors or performance may not be reflective of actual performance across a variety of settings familiar to the individual. In addition, because of the novelty of the testing situation, the individual may be quite nervous, potentially increasing the number of errors during the evaluation. If the evaluator spends only a few hours with the person being tested, it may be extremely difficult to make accurate predictions concerning the individual's employment potential. Assessment data conducted in a particular environment may have limited relevance concerning specific work skills and social behaviors that occur in actual work settings. If a worker has a 72 percent productivity rate in sheltered employment, that does not automatically mean that he or she cannot achieve a 100 percent productivity rate in a competitive, integrated work setting if the proper training and supports are made available.

Past performance may not be an accurate predictor of future performance. Vocational assessments/evaluations may have limited applicability in predicting job success because demands in the real world of work, specific work-related skills, the pace of a real job, and social interactions with supervisors and co-workers cannot be simulated. Whenever possible, assessments should consider multiple sources of vocational data, such as situational assessments, past work history and observations. Situational assessments provide an opportunity to try an individual in varying work settings where critical observations of interactions can be made. An advantage of this assessment model over more traditional, simulated-site vocational evaluation is that it offers an opportunity to determine how well a worker may begin to acquire site-specific skills.

Assessments assist the job coach in designing support plans for the prospective employee which allow that person to function in the role of a worker. The job coach

should focus on the following components:

1. The individual's aptitudes and abilities - what can the person do?

2. The individual's values - what does the person want to do?

3. The individual's tolerance - in what environments can the person do it?

Assessment information assists in placing a person with severe disabilities into a job that will maximize assets and minimize or remediate limitations whenever possible. Assessments should not be used to exclude individuals from employment opportunities but should be used in an attempt to increase the chance of a successful placement. Individuals with severe disabilities who have never been a part of the workforce or who have been excluded from the workforce for a lengthy period of time, can experience successful employment if they have a strong desire to work and appropriate supports are made available.

Some supported employment agencies develop a vocational profile for all consumers in their referral pool. Its purpose is to provide a picture of the consumer's skills, supports, preferences and other relevant life situations (Gold and Associates, 1986). The first section of the profile includes a summary of present skills and environments covering the following domains--domestic, community functioning, recreation/leisure, academic, motor and mobility, sensory, communication, social interaction, physical/health related, vocational and support. The second section of the profile involves preference/interest areas covering the consumer's work preferences, the parent/guardian work preference for the consumer, the consumer's hobbies, interest and enjoyment at home, observations of the kinds of work most enjoyed by the consumer and observations of social situations most enjoyed by the consumer. The third area of the profile involves a written description of typical routines experienced by the consumer including an hourly schedule of a typical day.

A vocational profile allows the job coach to develop a composite picture of the consumer's life in relation to employment. (An example is provided at the end of this section) (Leitner, 1988). Many of the same factors concerning a consumer are addressed by assessment forms and the vocational profile. However, the vocational profile is a detailed written document which requires a great deal of time to produce. Each agency must assess if they have adequate manpower to develop profiles on all consumers in their referral pool. If not, jotting down notes specific to a consumer on the assessment forms may be an adequate method in obtaining necessary employment information.

During the consumer assessment phase, many agencies design career plans for the individuals they are serving. Career planning should be approached as a lifelong process that is based on the assumption that, like individuals who do not have disabilities, people with severe disabilities may hold many jobs throughout their lives in order to improve the

quality of their life. For many workers, career goals are the guiding force in the choice of employment activities and work environments. Too often, workers with severe disabilities are placed in the first available job without considering the potential of each employment site to contribute to the overall quality of their lives. In addition, initial placements for people with severe disabilities are often thought of as permanent, with no opportunities to move to other desired jobs (Powell, Pancsofar, Steere, Butterworth, Rainforth, and Itzkowitz, 1988).

For example, an individual with no past work history is placed in a part-time, entry level position. After working nine months, the individual reports to the job coach that he or she is bored and now wants to work full-time. Since this person has gained valuable work experience, it should not be difficult to develop another job that is geared toward the individual's current desires. However, there are individuals who are satisfied with the job in which they were initially placed because they have developed a bond with their supervisor and co-workers, or thoroughly enjoy the job duties they perform. Career changes certainly have to be evaluated on an individual basis. However, the selection of employment opportunities for persons with severe disabilities should be guided primarily by the contributions of employment to the quality of the lives of workers and not merely by the availability of jobs (Powell, et al., 1988).

# CONSUMER ASSESSMENT QUIZ

1. Consumer evaluations are necessary to

   A. determine if an individual is in need of prevocational training prior to being placed into an employment situation.

   B. determine the severity of the disability and whether the individual is eligible to receive services from various agencies.

   C. determine if an individual will stay employed with the same company for at least five years.

   D. determine if an individual is sincere about risking all current benefits for an opportunity to work.

2. Consumer assessment is

   A. a comprehensive effort to obtain as much confidential information about the consumer as possible even when that information has nothing to do with future employment.

   B. a thorough investigation to identify the cause of the consumer's disability in an attempt to remediate or cure the disability.

   C. an analysis of the genetic traits of the disability in order to determine if the consumer's family members are also in need of supported employment.

   D. an organized and ccmprehensive evaluation of a person's capabilities, behaviors, and limitations which are relevant to vocational potential.

3. Consumer assessment involves

   A. a 30 minute meeting with the consumer's psychologist, conducting a job analysis and asking the consumer's peers how they think the consumer will perform in an employment situation.

   B. meeting with the consumer to explain supported employment, obtaining pertinent information from the consumer and significant others regarding employment, thoroughly reviewing the individual's past records, completing observations of the consumer in various environments when possible, and interviewing others who know the consumer well in order to identify the person's current abilities and needs related to getting and keeping a job.

C. making numerous employer contacts in order to develop a good job for someone with disabilities, randomly selecting someone on the waiting list to be placed in that job, and making bets to see how long that person will remain employed with that company.

D. meeting with the referred individual to judge if grooming skills and appearance are acceptable to be placed into a food preparation position at a local restaurant.

4. Objectives recommended during the intake interview should

A. only be completed if the job coach has time.

B. serve as criteria in which to exclude many individuals from employment opportunities.

C. assist the job coach in understanding the consumer's functional characteristics and needs when planning for the optimum placement for that individual.

D. enhance job development activities for any supported employment agency.

5. When reviewing the consumer's records, the job coach should focus on issues such as

A. past history, preferred learning styles, past behaviors that may interfere with work, and other's opinions about abilities, aptitudes, and needs of the consumer.

B. confidential materials unrelated to work, grammar and punctuation errors contained in the materials gathered, and misspelled words.

C. typographical errors and the negative aspects of the consumer, documenting why he should never work.

D. the financial status of the consumer which may indicate that he or she doesn't need to work even if he or she wants to work, past productivity rate in sheltered employment, and the consumer's I.Q. which is the primary indicator predicting job success.

6. Assessments and evaluations may have limited validity in predicting job success because

A. the evaluators are always biased.

B. job success is dependent only on the job coach's attitude regarding the placement.

C. the demands in the real work world--specific work-related skills, the pace of a real job, and social interactions with supervisors and co-workers--cannot be simulated.

D. job success is not an important factor when placing an individual with severe disabilities into a job.

7. Assessments assist the job coach

A. in designing support plans for the prospective employee.

B. in finding a job for the prospective worker that is not geared for specific abilities and needs.

C. in proving that his or her caseload is too large to adequately meet the needs of all people who have been placed into jobs.

D. in prioritizing who should be placed into a job first because of the length of time they have been on the waiting list.

8. A vocational profile allows the job coach to

A. view the consumer from the side.

B. develop a composite picture of the consumer's life in relation to employment.

C. develop a plan which only addresses the consumer's limitation in relation to employment.

D. subjectively select who will and who won't be placed into jobs.

9. Concerning career planning, the selection of employment opportunities for persons with severe disabilities should

A. ensure they are only placed in part-time, entry level positions.

B. end after initial job placement.

C. be considered optional since the job coach's priority is one-time-only placements for individuals in need of supported employment.

D. be guided primarily by the contributions of employment to the quality of lives of workers and not merely by the availability of jobs.

10. Assessment information assists in placing a person with severe disabilities into a job that will

A. minimize strengths and abilities and maximize limitations.

B. maximize strengths and abilities and minimize or remediate limitations.

C. maximize both abilities and limitations.

D. minimize both abilities and limitations.

## SOCIAL ASSESSMENT

CLIENT NAME: _____

ADDRESS: _____

DATE: _____ PHONE: _____ AGE: _____

I. Living situation:

_____with family
_____independent
_____other
_____with roommate (s)
_____in group home

a. Length of time at current residency? _____

b. Names of family members and approximate ages? _____

_____

_____

II. Transportation:

_____drivers license and _____available vehicle
_____bus route accessible _____other (explain)

_____

_____

III. Availability:

_____will work weekends
_____will work evenings
_____will work part-time
_____will work full-time

IV. Need:

A. What is your present income?

_____Child support/alimony
_____Unemployment
_____Lease or rental income
_____Social Security
_____AFDC or GA
_____SSI
_____Allowance
_____Other income

B. What kind of resources do you have?

_____Checking account
_____Savings account
_____Property
_____Trust fund
_____C.D.
_____Other
_____Vehicle
____Year _____Model

C. Willing to risk benefits? _____

D. Motivation

0--------1--------2--------3--------4---------5

No motivation — Very highly Motivated

E. Comments: _____

_____

_____

_____

V. Education and training:

a. Did you graduate from high school? ____yes ____no

1. School graduated from: _____

2. Last grade completed and school attended: _____

_____

b. Classes/training: _____

_____

_____

_____

c. List three school references: _____

_____

_____

_____

d. Did you have a problem with attendance or tardiness? _____

_____

_____

_____

VI. Interests and Hobbies:

_____

_____

VII. Household responsibilities:

_____

_____

VIII. Job preferences:

_____

_____

_____

_____

a. Is there any kind of work you are not willing to do?_____

_____

b. Are you willing to work for minimum wage?_____

c. Do you have any limitations that might affect job performance?

_____

d. Would you object to working with other people with disabilities?_____

IX. Family Support:

a. Does your family have any objections or reservations about you obtaining employment?_____

b. How supportive are they?

0--------1--------2--------3--------4--------5
Negative about work — Willing to go out of the way to support work

c. Comments:_____

_____

_____

X. Social history:

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Name and Complete address of employer_____Type of Business_____
_____Average hrs/week_____
_____Highest salary $_____
Name of Immediate supervisor_____Dates_____to_____
_____Did you have problem being
Phone #_____late or absent?_____
Describe your duties in detail (job title, knowledge, skills, abilities required, likes, and dislikes)_____
_____
How did you get along with the boss?_____
_____
How did you get along with co-workers?_____
_____
Reason for leaving?_____
_____
_____
==========

Name and Complete address of employer_____Type of Business_____
_____Average hrs/week_____
_____Highest salary $_____
Name of Immediate supervisor_____Dates_____to_____
_____Did you have problem being
Phone #_____late or absent?_____
Describe your duties in detail (job title, knowledge, skills, abilities required, likes, and dislikes)_____
_____
How did you get along with the boss?_____
_____
How did you get along with co-workers?_____
_____
Reason for leaving?_____
_____
_____
==========

Name and Complete address of employer_____Type of Business_____
_____Average hrs/week_____
_____Highest salary $_____
Name of Immediate supervisor_____Dates_____to_____
_____Did you have problem being
Phone #_____late or absent?_____
Describe your duties in detail (job title, knowledge, skills, abilities required, likes, and dislikes)_____
_____
How did you get along with the boss?_____
_____
How did you get along with co-workers?_____
_____
Reason for leaving?_____
_____
_____

## CLIENT SCREENING FORM

Client name:_____

Date of screening:_____

| | | | | | |
|---|---|---|---|---|---|
| 1. Availability | Will work weekends | Will work evenings | Will work part-time | Will work full-time schedule | Will work a variable |
| COMMENTS: | ____ | ____ | ____ | ____ | ____ |

| | | | | |
|---|---|---|---|---|
| 2. Travel | Uses Bus | Uses bus and transfers | Requires bus training | Can obtain travel arrangements |
| COMMENTS: | ____ | ____ | ____ | ____ |

| | | | |
|---|---|---|---|
| 3. Strength | Fair | Average | Strong |
| COMMENTS: | ____ | ____ | ____ |

| | | | | |
|---|---|---|---|---|
| 4. Endurance | Light work/ many breaks only | Light work/ few breaks | Full day/ many breaks | Full day/ few breaks |
| COMMENTS: | ____ | ____ | ____ | ____ |

| | | | | |
|---|---|---|---|---|
| 5. Rate | Slow | Steady/ Average pace worker | Above Average speed if prompted | Fast Independent worker |
| COMMENTS: | ____ | ____ | ____ | ____ |

| | | | | |
|---|---|---|---|---|
| 6. Attention | Frequent prompts required | Intermittent prompts/high supervision | Intermittent prompts/low supervision | Infrequent prompts/low supervision |
| | ____ | ____ | ____ | ____ |

COMMENTS:

Do you need a supervisor around to remind you of what to do? ____

To tell time? ____

To keep up speed? ____

| | | | |
|---|---|---|---|
| 7. Independent | Performs 2-3 tasks in sequence | Performs 4-6 tasks in sequence | Performs more than 7 tasks in sequence |
| | ____ | ____ | ____ |

COMMENTS:

Can you remember to do a series of things without a list or supervisor? _____

| | | | | |
|---|---|---|---|---|
| 8. Initiation | Always seeks work | Sometimes volunteers | Rarely volunteers | Avoids next task |
| | ____ | ____ | ____ | ____ |

COMMENTS:

Are you comfortable asking people if you can help them?_____
Do you like to help others or do you think everyone should do their own job?_____

| | | | | |
|---|---|---|---|---|
| 9. Adapting to change | Learns new tasks easily | Accepts new tasks | Is confused by change | Rigid routine required |
| | ____ | ____ | ____ | ____ |

COMMENTS:

| | | | | |
|---|---|---|---|---|
| 10. Reinforcement Needs | Frequent required | Intermittent sufficient | Infrequent sufficient | Pay check sufficient |
| | ____ | ____ | ____ | ____ |

COMMENTS:

11. Family Support

| Goes out of way to support work | Somewhat supportive of work | Indifferent about work | Negative about work |
|---|---|---|---|
| ____ | ____ | ____ | ____ |

COMMENTS:

12. Supervisory Styles

| Requires friendly boss | Doesn't matter if clear instructions given | Will question if doesn't understand instructions | Can accept abrupt criticism |
|---|---|---|---|
| ____ | ____ | ____ | ____ |

COMMENTS:

13. Financial situation for client and employer

| Willing to risk benefits | Not willing to risk benefits | SSDI eligible only (TJTC?) |
|---|---|---|
| ____ | ____ | ____ |

COMMENTS:

14. Learning Style

| Repetitive verbal cues | Modeling | Visual aids | Physical prompts |
|---|---|---|---|
| ____ | ____ | ____ | ____ |

COMMENTS:

15. Social Climate

| Works best alone | Works best without area co-workers | Works best with area co-workers | Can work in any environment |
|---|---|---|---|
| ____ | ____ | ____ | ____ |

COMMENTS:

16. Client reaction to

| Will respond | Can't accept | Can accept if infrequent |
|---|---|---|

requests for
speed or products

COMMENTS:

17. Adapting to different bosses — Accepts instructions from females ____ — Accepts instructions males ____ — Is confused by variety of supervisors on different shifts ____ — Requires 1 boss ____

COMMENTS:

18. Reaction to service — Willing to accept on-site job coaching ____ — Requires job matching without on-site teaching ____

COMMENTS:

These items may not be appropriate for asking client and may need to be filled in by observation.

19. Orienting — Small area only ____ — Several rooms ____ — Building wide ____ — Building and grounds ____

COMMENTS:

20. Mobility — Sit/stand in one area ____ — Fair ambulation ____ — Stairs/ minor obstacles ____ — Many physical abilities ____

COMMENTS:

21. Appearance — Unkempt ____ — Just clean ____ — Neat and clean ____ — Dresses well ____

COMMENTS:

Do you mind getting up early to clean up every day before work? _____

| | | | | | |
|---|---|---|---|---|---|
| 22. | Communication (expressive) | None | Some key words | Sentences (impaired) | Sentences (clear) |
| | | ____ | ____ | ____ | ____ |
| | COMMENTS: | | | | |
| 23. | Interaction | Low or few interactions | Polite when given instructions | Can interact socially infrequently | Can interact socially frequently |
| | | ____ | ____ | ____ | ____ |
| | COMMENTS: | | | | |
| 24. | Interfering Behavior | Many unusual behaviors | | Unusual behavior infrequent | Minimum interfering behavior |
| | | ____ | | ____ | ____ |
| | COMMENTS: | | | | |
| 25. | Functional Academics | Cannot distinguish between work supplies | Distinguishes between work supplies | Simple counting/ number work | Simple reading/ some words |
| | | ____ | ____ | ____ | ____ |
| | COMMENTS: | | | | |
| 26. | Time Awareness | Unaware of time and clock function | Identifies breaks and lunch | Can tell time to the hour | Can tell time in hours and minutes |
| | | ____ | ____ | ____ | ____ |
| | COMMENTS: | | | | |
| 27. | Communication (receptive) | None | Simple words | Complete sentences | Series of instructions |
| | | ____ | ____ | ____ | ____ |
| | COMMENTS: | | | | |
| 28. | Types of Interactions with peers | | Assertive behavior | Ability to deal with change | Social skills |
| | | | ____ | ____ | ____ |
| | COMMENTS: | | | | |

| 29. Discretion | Independent judgement calls on speed | Independent judgement on quality | Independent judgement on prioritization of tasks |
|---|---|---|---|
| | ____ | ____ | ____ |

COMMENTS:

Other qualifying factors such as religious obligations or time preference:

RRTC:Virginia
Revised by Job Connection

**INFORMATION RELEASE**

Job Connection has my permission to talk to a present or past employer for information about my job performance.

_____ _____

Signature Date

Job Connection has my permission to contact any of my personal references.

_____ _____

Signature Date

This authorization for the release of information is valid the entire time this individual is in the referral pool or receiving services from Job Connection, Inc. unless you object to this. If you object, please sign a date that you wish us to relinquish right to obtain release of information _____.

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## RELEASE OF INFORMATION

_____ _____
Client name Date

I authorize Job Connection to obtain the following information:

( ) MEDICAL _____
Name of person or agency

_____
Address, city, and state

_____
Signature Date

( ) PSYCHOLOGICAL _____
Name of person or agency

_____
Address, city, and state

_____
Signature Date

( ) VOCATIONAL EVALUATION _____
Name of person or agency

_____
Address, city, and state

_____
Signature Date

( ) SSI/SSDI/VA _____
Name of person or agency

_____
Address, city, and state

_____
Signature Date

_____ _____
Witnessed by: Date

This application and release of information is valid for the entire time you are in our referral pool or you are receiving services from us unless you object to this. If you object, please sign a date that you wish us to relinquish right to obtain release of information _____.

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# EMPLOYMENT ADVOCACY

The main points covered in this section are:

1. The definition of advocacy as it relates to supported employment;

2. A description of pre-employment advocacy activities;

3. A description of direct employment advocacy activities;

4. A description of indirect employment advocacy activities; and

5. A description of post employment advocacy activities.

# EMPLOYMENT ADVOCACY

Advocacy, as it relates to supported employment, is the provision of any and all services by the job coach, case manager, VR counselor, family members and others which makes employment more obtainable or maintainable for workers with disabilities. The role of an advocate begins with job development and continues through the entire placement, training, and follow-along process (Sakrey and Nutter, 1986). There are some workers who may have family members and other professionals able to assist the job coach in providing necessary supports for the worker. For example, a residential trainer or parent may assist the worker with banking, budgeting, shopping and grooming skills all of which may influence the worker's job performance. However, there are other workers who may live alone and who do not receive services or support from anyone else except the job coach. If this is the case, the job coach may need to provide or find appropriate services to assist the worker with daily living needs. The following lists job coach advocacy activities occurring prior to employment, during employment, and after employment if job loss occurs. This list is adapted from Sakrey and Nutter.

## PRE-EMPLOYMENT ADVOCACY

1. If parents or significant others are apprehensive about having the prospective worker involved in supported employment, the job coach and case manager should explain that supported employment is a viable vocational option and is beneficial for the worker. The individual will make more money than ever before, will have a chance to interact and form relationships with people without disabilities, and will have an opportunity to demonstrate his or her capabilities as a productive employee.

2. Prior to job placement, the job coach should communicate all important employment information to the worker's case manager(s), family members, day program and residential staff when applicable, school personnel, and VR/DDD staff when applicable. Working closely with agency representatives and family members should minimize any misunderstanding that could occur in the future.

## DIRECT EMPLOYMENT ADVOCACY

1. When necessary, the job coach will advocate for the appropriate job accommodations or modifications needed by the worker.

2. The job coach will guard against unfair treatment of the worker at his or her place of employment. In one case, a co-worker who had the same job description as the supported employee kept delegating undesirable job duties to the supported employee. The worker with disabilities was always made to clean filthy grills, all customer accidents, and perform all bathroom checks until the job coach

intervened. In another case, Heather, who is employed at a hospital, had worked three consecutive Christmas and New Year's Eves. When she asked for Christmas Eve off three months in advance, her employer informed her she would have to work because the other employees wanted that evening off. All of Heather's co-workers had been employed less than a year and had never worked those two evenings. Heather and her job coach talked to the employer, and Heather was allowed to take that particular evening off.

3. When necessary, the job coach should provide guidance and training for the worker regarding appropriate social skills at the work site. In addition to role playing, the job coach may work with co-workers and supervisors about how to respond when the worker behaves a certain way.

4. The job coach should continue to monitor the worker's pay rate, benefits, and work schedule. Prior to placement, the job coach should determine if there are scheduled pay raises and advocate for raises if they do not automatically occur as the worker continues to perform the job to criterion.

5. The job coach should continue to communicate with family members and other involved parties on a regular basis about the worker's progress and/or employment problems. For example, one worker called and informed the job coach that she had a bad day. The worker said she had decided to quit the job and wasn't going to work the next day. The job coach stated to the worker that everyone has bad days in which they are tempted to quit their jobs, but a good worker will give the boss at least two weeks' notice before doing so. After the worker hung up the phone, the job coach immediately called the VR counselor, mental health case manager, and the worker's sister to inform them of this event. All agreed with the job coach's response and said they would repeat the same thing if she contacted them, which she did. Later that day, the job coach called the worker and asked if she was going to work the next day, and she replied yes. She had a great day at work and decided that she really didn't want to quit her job.

INDIRECT EMPLOYMENT ADVOCACY

1. When necessary, the job coach should help the worker obtain adequate health care, especially if someone notices medical problems at work. If the worker is not able to attend medical appointments alone, the job coach should provide transportation or make other arrangements.

2. When necessary, the job coach will assist or find someone to assist the worker in daily living skills as well as facilitating worker access to leisure and recreational activities.

3. When necessary, the job coach will help the worker to access specialized training programs or counseling services and alert the case manager of the worker's need.

4. When necessary, the job coach will help the worker secure stable living arrangements which can certainly benefit job performance.

POST EMPLOYMENT ADVOCACY

1. If a worker is laid off, fired, or quits a job, the job coach should assist the worker with the resignation or termination process.

2. If the worker is not returning to work because of medical problems or other justifiable reasons, the job coach and case manager may work together to help the worker notify SSA or the welfare office of his or her current status so that full benefits can be reinstated. When appropriate, the job coach can help the worker apply for unemployment benefits.

3. If it is appropriate to place the worker into another supported employment job, but it takes more than a month to do so, the job coach and case manager may work together to help the worker notify SSA or the welfare office of his or her unemployment. If the worker is not receiving any benefits, and is not eligible for unemployment, the job coach should place this person into a new job as quickly as possible.

4. The job coach and case manager may work together to assist the individual in obtaining Section 8 housing, food stamps, food commodities, general assistance, and low income energy assistance.

5. The job coach may refer a worker back to vocational rehabilitation if the worker wishes to attend vo-tech, college, adult education, or a trade school.

The job coach needs to be flexible and creative when providing advocacy services. For example, workers may require transportation training at 6:00 a.m. Saturday morning. Workers may need temporary assistance with daily living needs such as financial obligations, including food and rent. Job coaches and others may even have to intervene in relationships that have a negative influence on job performance, such as a friend or co-worker who is taking advantage of the worker. The worker may also obtain these services from other agencies when eligible, but the job coach may have to assist.

Professionals cannot be everything to everyone and must prioritize responsibilities while also developing a network of expertise and support for workers with disabilities. We should actively seek out other support systems to assist the worker in these daily living needs.

## EMPLOYMENT ADVOCACY QUIZ

1. Advocacy as it relates to supported employment is

   A. the provision or supports available to the worker while attending school.

   B. the provision of pre-employment services only, which makes employment more obtainable for the worker.

   C. the provision of direct employment services only, which makes employment more maintainable for the worker.

   D. the provision of any or all services by the job coach which makes employment more obtainable and maintainable for the worker.

2. Pre-employment advocacy services may include

   A. assisting the worker with transportation arrangements, nutritional needs, and applying for unemployment benefits.

   B. confirming the worker's pay rate, benefits and work schedule, assisting the worker with a resume, job application and interviewing skills, educating the worker and family of the effects of employment on current benefits, and informing the employer of TJTC.

   C. guarding against unfair treatment directed toward the worker, monitoring the worker's pay rate and benefits, facilitating worker access to community resources, and providing training in daily living skills.

   D. job development, on-site training, and follow-along services.

3. Direct employment advocacy services may include

   A. informing the employer of tax benefits, convincing significant others that supported employment is a viable option for the prospective worker, and notifying SSA of the worker's unemployment.

   B. assisting the worker in applying for unemployment benefits, completing new job applications, providing training in money management, and establishing a positive working rapport with the worker's parents and the employer.

   C. assisting the worker with transportation to and from work, helping the

worker obtain needed work supplies and work clothes, and monitoring the worker's wages, benefits, and work schedule.

D. none of the above.

4. Indirect employment advocacy services may include

A. assisting the worker with obtaining adequate medical care, daily living needs, and securing stable living arrangements.

B. providing training on work-related skills, acting as a role model to supervisors and co-workers on appropriate ways to interact with the worker, and advocating for pay raises for the worker.

C. assisting the worker with resignation or termination procedures, monitoring the worker's wages and benefits, and providing transportation training.

D. providing training in job development, job analysis procedures, job matching activities, systematic instruction, and follow-along services.

5. Post employment advocacy services may include

A. assisting the worker with community mobility skills, completing W-4 and naturalization forms, facilitating worker access to leisure time and recreational activities, and encouraging the worker to move out of state.

B. helping the worker sign his or her name to a form indicating that he or she will no longer be a supported employee, and encouraging him or her to move out of town and wishing him the best of luck.

C. making sure the worker notifies SSA or the welfare office of his or her unemployment, assisting in applying for unemployment benefits when appropriate, and referring the worker to alternative services or programs.

D. dismissing the worker from supported employment services although he or she is ready and willing to work and lost the last job because the company went out of business.

6. If a worker does not have an adequate work wardrobe and does not have any money to purchase new clothing the job coach should

A. inform the worker's employer that the worker is poor and consequently will have to look inappropriate at work.

B. ignore the worker's need since it probably won't adversely effect job performance.

C. find out if the provider agency could loan money to the worker in which to purchase clothing items that would be appropriate for work.

D. put the issue on the back burner since there are more serious "brush fires" to attend to.

7. If the worker requires assistance in completing a Social Security redetermination form, the job coach should

A. tell the worker to try to fill it out and send it back when convenient.

B. complete the form with the worker and send it back in a timely manner.

C. argue with the worker's case manager that it is their responsibility to compete the form.

D. request that the employer completes the form.

8. If the job coach observes that the employer has delegated more job tasks to the worker, but expects them to be completed in the same amount of time as previous job assignments which is not possible for the worker, the job coach should

A. ignore the problem in order to avoid job loss for the worker.

B. ignore the problem because the job coach does not want to cause waves.

C. encourage the worker to walk off the job.

D. tactfully explain to the employer that the worker needs more time to complete the additional job duties or that it might be best to re-implement the original job description.

9. Which one of the following oversights on the part of the job coach could result in the most serious negative repercussions for the worker?

A. forgetting one month to contact all involved parties and communicating the worker's progress and/or employment problems.

B. forgetting to thoroughly explain to the worker and his or her family how the wages of the new job will affect the worker's current benefits.

C. forgetting to meet the client after work in order to purchase new work shoes.

D. forgetting one month to complete a progress report regarding the worker's progress and/or employment problems.

10. The role of advocacy

A. begins with job development and continues through the entire placement, training, and follow-along process.

B. begins with job development and ends once the job coach has successfully faded out.

C. begins with systematic instruction and continues past the ongoing support phase of supported employment.

D. begins during extended services.

# ESTABLISHING SUPPORTIVE RELATIONSHIPS

The main points covered in this section are:

1. The role of advocacy for parents;

2. Family systems theory;

3. Unique needs and desires of families and caregivers;

4. Issues discussed during the initial meeting with families and/or caregivers, hereafter referred to as family, families, or family member(s);

5. Common questions, concerns and fears raised by families;

6. Job coach techniques that enhance supportive relationships with families; and

7. Job coach interactions that may negatively impact supportive relationships with families.

# ESTABLISHING SUPPORTIVE RELATIONSHIPS

The relationship between professional supports and the worker's family serves as the foundation to develop and implement quality supported employment programs for individuals with severe disabilities. Given their intimate relationship and knowledge of the person with a disability, family members will often make significant contributions to the supported employment process (Powell, et al., 1988). Parents are the best advocates for their children. They have been the most important and constant support system for their child from birth through adulthood. Since they know their child better than a provider, family members can supply a wealth of information about their child's current abilities and needs, both at home and across a variety of community settings.

Family systems theory is the foundation for work and families. Within this theory, each family is unique, varying with respect to size, membership, socioeconomic status, educational background, cultural background, handicapping condition, and geographic location. Families serve as a primary source of learning and social exchange for all human beings. Family members learn about individual differences and similarities, relationships, work ethics, values, and morals. Individual members acquire skills like walking, talking, playing, sharing, competing, and negotiating. Each member contributes to the overall composition of a family. All individual members have personal characteristics that are distinct from others in the family system (Turnbull and Turnbull, 1988).

The life of a family is not static. As individual members age, the issues, concerns, and needs change. Family needs are economic (e.g. generating money), health care (e.g. locating health care staff), recreation (e.g. participating in community events), socialization (e.g. developing friendships), self identity (e.g. developing a sense of self), affection (e.g. acknowledging others), and vocational (e.g. securing a job that a worker enjoys). These needs must be considered across the life cycle or developmental stages of each family including early childhood, school age, adolescence, and adulthood (Turnbull and Turnbull, 1988). To work effectively with families, job coaches must consider the dynamics of individual families, their needs, and their particular place within the family life cycle (Powell, et al., 1988).

If the prospective worker lives at home with his or her parents, or receives residential services, the job coach should schedule a meeting with the individual and family. The meeting should be at a time and place convenient for all participants. It may take place at the family home, the worker's apartment, or the job coach's office.

During this meeting, the job coach should explain supported employment services, answer questions, and address concerns that family members and caregivers may have. The job coach may inform participants how many supported employees have been placed into jobs by the corporation and how many are presently working. The job coach

also explains that employers make the final decision about who is hired, and that there have been instances when supported employees have experienced job loss. If time allows, the job coach may conduct an intake assessment about the prospective worker and solicit input from everyone attending this meeting. Prior to this meeting, the job coach should try to view the individual's needs from the parent's and/or caregiver's perspective. What do they want for their son or daughter? Most parents want their child to be happy, healthy, safe, secure, and loved. Many parents would like their child to be employed, to be productive, to earn and/or receive enough money to allow economic self-sufficiency, to be as independent as possible, to have friends, and to participate in life to the maximum extent possible (Powell, et al., 1988).

If the prospective worker has recently left school, the parents need to understand the difference between work experience programs and supported employment. Frequently, work experience involves creating a job for a student in an actual business, with the salary being paid through wage subsidies. The student's work hours are Monday through Friday when school is in operation. Since a job is created for the student, he or she might only assist regular employees. Work demands may be quite marginal. In supported employment, the prospective worker fills a vacant position which most often has been performed by a non-handicapped worker. The work schedule may vary and may require evening and/or weekend shifts without the extended vacation time that students experience in school. The job demands in the world of work may be challenging. The worker may come home exhausted during the initial stages of employment.

Since supported employment is a relatively new concept, family members may not be familiar with it; others have heard it and find it confusing. When providing information to families, it is essential that accurate information be communicated by the job coach and other professional supports so that each person can clearly understand the concept of this vocational option (Powell, et al., 1988). It is important to remember that each family is unique. Some individuals may convey an initial opposition to supported employment and others may be excited about the opportunity. These individual responses must be anticipated and dealt with in a knowledgeable and understanding manner. Job coaches should discuss the family's questions or concerns about supported employment and identify obstacles that may interfere with providing quality supported employment options for individuals with disabilities (Powell, et al., 1988).

The following are common questions that family members have about supported employment:

1. What types of jobs are available for people with disabilities?

2. Can the person with disabilities really handle the demands of a real job?

3. How will transportation be arranged? Will family members have to provide transportation?

4. Will co-workers and supervisors accept the individual with disabilities?

5. How will people with disabilities learn to do their jobs?

6. If a person becomes employed, will he or she lose current benefits including medical insurance?

7. What about the safety factors of some jobs?

8. What happens if employees are ridiculed, embarrassed, or treated unfairly by other company employees?

9. What happens if the employee becomes lost when going to or from work?

10. What happens if the employee is alone and behaves in an unacceptable manner in public?

11. What happens if the employee loses a job?

Based on the job coach's past experience and competence, it should be relatively easy to answer those honestly and professionally. When obstacles are identified, all participants should work together in seeking resolutions. This meeting is the first step in understanding the family's concerns and in building an ongoing relationship between the family and job coach. The job coach must realize that the family's values and concerns might be quite different than his or her own, and by relating these differences to the specific family needs in a nonjudgemental way, the job coach can validate, understand, and address particular employment issues concerning families (Britt, et al., 1987). Since supported employment is somewhat non-traditional, and often requires a higher level of risk than school and sheltered employment, those questions asked by significant others are certainly warranted. In addition, family members will have to assess their own flexibility related to the individual working evenings and weekends and consider to what extent they are willing to allow a reduction or risk in benefits.

At the close of the meeting, the job coach may offer to send participants written materials addressing the concerns they have and encourage them to contact other families involved in supported employment. The job coach should also assure them that if they are interested in supported employment services, he or she will maintain regular contact regarding the worker's progress and needs.

Once the family decides on supported employment services and an appropriate job is developed, the job coach again contacts the family to discuss the details of the position.

The job coach should solicit the family's support and/or listen to their concerns regarding employment for the individual. At this point, the job coach will clarify exactly how the wages of the new job will affect the individual's current SSI/SSDI/VA or welfare benefits. If the job is acceptable to all involved, the job coach will share with the family any information needed to make sure the new employee is prepared for the interview, or is ready to start work on the first day. Preparations may include making transportation arrangements, purchasing shoes or clothing, taking money for meals, etc. Professional support systems should encourage and reinforce the family to take an active role in these arrangements, but provides assistance at times when the family is unable to do so. This type of shared planning and support of the worker should continue throughout all phases of supported employment (Britt, et al., date not available). It is critical that the job coach follows through on all commitments made with family members in order to maintain his or her creditability and the level of trust established with them.

The following strategies should be used when establishing supportive relationships with families.

1. Communicate - family members want to know what is going on with the person's job. Because some individuals receiving support have difficulty communicating, the job coach is a natural communication link. The job coach needs to call family members to inform them how the individual is performing on the job. Some find a weekly checklist of job accomplishments a helpful strategy. A formal letter of congratulations regarding successful job performance is always welcomed.

2. Respect the confidentiality of the family - as the professionals get to know the family, they will be trusted with more personal information about the person and family members. That trust is founded upon the assumption that the professional will keep information confidential, which means not sharing sensitive information with co-workers, friends, spouses, or others.

3. Respect privacy - sometimes the family does not want to share information with the job coach or other professionals. In these cases, it is best to tell the family that the job coach is interested for professional reasons only and allow them to make the first move to establish a relationship.

4. Limit extra demands - family members have so many demands on their time that additional demands by the supported employment professionals should be limited. Asking the family members to provide transportation to the work site, conduct banking activities, and work with the Social Security office may be too much for a family to do. Before asking a family member to do a task, it is better for the professionals to ask "How else can we accomplish the task without placing a new demand upon the family?"

5. Limit bad news communication - many family members hear from the professionals only when problems occur. Often the family has little control over the problem. Before sharing bad news, it is important to determine if the information is absolutely essential to share. Can the family really help to resolve the situation? Honest answers to these questions will serve as a guide about sharing specific information with families.

6. Minimize surprises - problems do happen with supported employment programs. However, to really assist family members, the job coach should minimize surprises. Problems with transportation, work schedules, and job supervision should be anticipated, and if these problems affect the family, advanced warning is always appreciated.

7. Provide flexible support - the type of support that is provided by the job coach and other professionals may vary depending on the family. For some families, going out to buy special work uniforms may be a problem; for others, doing the necessary banking or helping the individual attend a party with co-workers may be too difficult to arrange. If the job coach considers these and other activities part of the support needed to keep someone employed, and then provides this support, both the individual and the family will benefit (Powell, et al., 1988).

When professionals interacts with families and the worker, they should convey a sincere, caring, understanding, and respectful attitude. Families can provide a wealth of information about the worker which should assist the job coach in placement and support services. However, there may be times when professionals, including job coaches, encounter a family situation which presents serious problems. When this occurs, the job coach and case manger should meet with the family so that such problems can be resolved. The job coach and other professionals must always positively and professionally interact and communicate with family members on a regular basis. Without residential support, it is doubtful that the supported employee will experience job success, satisfaction, or retention.

# ESTABLISHING SUPPORTIVE RELATIONSHIPS QUIZ

1. Family members are the most significant and constant support system for the individual with disabilities. Because of this, families will

   A. always oppose the idea of supported employment because they know that their child could never handle the demands of a real job.

   B. never want their child to work because he or she may become more independent and rely less on family members for meeting his or her needs.

   C. supply a wealth of information about their child's current abilities and needs across various community settings which may greatly assist the job coach with the assessment, placement, and follow-along procedures.

   D. never make important contributions to the supported employment process.

2. Family systems theory states that

   A. all families have similar needs and that family life by nature is quite static.

   B. families have unique needs and, as individual family members age, the issues, concerns, and needs of a particular family change.

   C. children learn more from their peers during adolescence than they do from their parents.

   D. families who have children with disabilities come from the same socioeconomic status, educational, and cultural background.

3. When the job coach meets with the family, he or she should

   A. provide an explanation of supported employment including the role and responsibilities of the job coach, discuss secondary gains that are derived from supported employment, and address any questions or concerns that the participants have.

   B. provide an explanation of supported employment and emphasize his or her own educational background and experience demonstrating that he or she is a qualified job coach.

   C. provide an explanation of supported employment and imply that the risks involved are secondary issues that should not be given much thought.

D. provide an explanation about supported employment including the roles and responsibilities of the job coach and indicate that this vocational option may only be a passing fad.

4. During the initial meeting the job coach should

A. promise the family that a job will be found for their child by the end of the week.

B. begin to understand what the family's concerns are. This will assist in building a supportive relationship which will enhance supported employment activities.

C. spend 10 minutes or less with the family to determine if they endorse or oppose supported employment.

D. consider the unique needs of the family, but not address or discuss any of their concerns regarding supported employment.

5. If, at the close of the meeting, family members appear to still have apprehensions about supported employment, the job coach should

A. become upset because supported employment should meet everyone's needs.

B. take the prospective worker's name off of the referral/waiting list.

C. dismiss their apprehensions since their ideas about supported employment are inaccurate.

D. offer to send them written materials related to their specific concerns, encourage them to contact others who have a family member in supported employment, or offer to show them a videotape in which families provide testimony on supported employment.

6. Components that enhance building supportive relationships with families may include

A. good communication, respecting the confidentiality of the family, pitying the family when appropriate, placing extra demands on the family so they have something to do, and minimizing surprises.

B. good communication, respecting the confidentiality and privacy of the family, limiting extra demands for the family, and providing flexible supports

to meet the unique needs of the family.

C. good communication, assisting the family to form their values, withholding information that may hurt their feelings, mandating their active involvement, and providing rigid supports.

D. good communication, respecting their privacy, limiting extra demands, and providing minimal supports.

7. When the job coach interacts with families, he or she should

A. try to change their point of view if they disagree with a vocational issue.

B. convey a sincere, caring, understanding, and respectful attitude.

C. pass judgement on their lifestyle in order to improve the situation.

D. use professional jargon and labels so that the family will be truly impressed with his or her knowledge of supported employment.

8. If the family wants supported employment services and if the job coach develops a job well-matched to the person's ability and needs, the job coach should

A. withhold as much information as possible so that significant others won't worry about the risks and safety factors of the job.

B. withhold as much information as possible so that significant others won't visit the worker at the job site.

C. inform significant others that the employer is a "bleeding heart liberal" who could never fire anybody.

D. discuss the details of the job so the family can share in the planning and support of the worker.

9. If the job coach encounters major problems with a particular family, he or she should

A. dismiss the worker from supported employment services.

B. terminate all communication with the family.

C. schedule a team meeting to resolve those problems.

D. refer the worker to another agency that provides supported employment services.

10. Without residential support

A. it is doubtful that the supported employee will experience job success, satisfaction, or retention.

B. such circumstances will not affect the worker's job performance.

C. it is likely that the worker's job performance will improve.

D. none of the above.

# SOCIAL SECURITY

The main points covered in this section are:

1. The difference between the Supplemental Security Income (SSI) system and Social Security Disability Insurance (SSDI) or Social Security Administration (SSA) system;

2. SSDI work incentives:

   A. A definition of Substantial Gainful Activity (SGA) and its consequences;

   B. Trial Work Periods (TWP);

   C. Extended Period of Eligibility (EPE); and

   D. Impairment-Related Work Expenses (IRWE).

3. SSI work incentives:

   A. A definition of SGA and its application to SSI recipients;

   B. the effect of earnings in SSI benefits;

   C. 1619 (a);

   D. 1619 (b);

   E. (IRWE); and

   F. Plan to Achieve Self-Support (PASS).

# SOCIAL SECURITY

There are two payment systems administered by the Social Security Administration (SSA) system. They are very different in their philosophical basis, eligibility requirements, and in the work incentives that apply.

The two systems are:

1. The Social Security Disability Insurance (SSDI) or the Title II program.

2. The Supplemental Security Income system (SSI) or the Title XVI program.

## SSDI

The SSDI system has the same philosophical base of any insurance program. People work and pay into the SSA system. Payment into the SSA system is most frequently utilized as a retirement program, but it also entitles people to payments if they become medically disabled. Payment amounts are determined by the number of years and amount of Social Security (SS) paid into the system. People with developmental disabilities are often eligible for this program through their parent's work record. There is a provision in the law that allows dependents with disabilities to receive a benefit based on the parent's work record if the parent retires, becomes disabled or the primary wage earner of the family is deceased. Adults with developmental disabilities fit into this definition and may receive SSDI benefits even though they have never worked. (Keep this in mind because work earnings affect SSDI payments differently than they do SSI payments.)

To be eligible for SSDI an individual must:

1. Have paid in enough years of coverage. (roughly half of the number of years since age 21, or be an eligible dependent).

2 Be medically disabled or determined to be medically disabled by the Disability Determination Bureau (DDB) (or by an appeals process).

3. Not be working or be working but earning less than the Substantial Gainful Activity (SGA) level.

## SUBSTANTIAL GAINFUL ACTIVITY

1. Is the performance of significant physical or mental work activities for remuneration or profit.

2. Is usually determined to be countable earnings of over $500 per month. (SSDI applicants or beneficiaries who are blind have a higher limit that changes annually; over $810 per month for 1991). The dollar value of subsidies and IRWEs is subtracted from gross earnings in deciding whether work is Substantial Gainful Activity (SGA). Different guidelines are used to determine SGA for self-employed people.

3. Applies to the SSDI program.

4. Applies to the SSI program only in determining if a person is initially eligible for SSI disability payments.

5. Does not apply to SSI recipients who are blind. (APSE SSA Manual 1990).

The most commonly used work incentives that apply to the SSDI system are:

1. Trial Work Period - TWP.

2. Extended Period of Eligibility - EPE.

3. Impairment Related Work Expense - IRWE.

4. Extended Medicare.

## TRIAL WORK PERIOD

If someone is determined eligible for SSDI benefits and decides to return to work, the first work incentive they will probably use is called the Trial Work Period. A TWP is a temporary number of months during which a SSDI beneficiary can work and earn over $200 just in order to try work. The Social Security rules allow for nine total months of trial work. In order to be considered a trial work month the person must make over $200. The months do not have to be consecutive. During any trial work month the person is eligible for their full SSDI check, which allows them to maintain benefits while attempting work. To track when a person has used a trial work month, begin the first month a person makes over $200 and count every month a person makes over $200 from the initial point of eligibility.

A case history follows: Joe worked for 20 years and then experienced severe depression and was hospitalized. He returned to the community, and the local mental health facility helped Joe apply for benefits. Joe received a $660 SSDI payment starting in January 1990. Joe went back to work for his previous employer in February and worked through July of 1990. Joe made $1000 a month for those six months and also received his total SSDI check of $660. Then he was laid off, and continued to receive his SSDI check of $660 a month.

Joe did not attempt work again until January 1991. He received a small job making $150 and he continued that job for six months. These months do not use up his TWP as he made less than $200 a month.

In July 1991 Joe was offered a full-time job. From July through December 1991, he earned $600 each month. However, he used six of his trial work months in 1990 so as soon as Joe used three more in 1991 he had used up his trial work periods. September 1991 was the last month he was eligible for a trial work month. October, November and December 1991 were the starting months of the second work incentive which is called Extended Period of Eligibility (EPE). (TWPs are only available if the person remains medically disabled. If the person recovers, he may not be eligible for nine trial work months).

## EXTENDED PERIOD OF ELIGIBILITY

The Extended Period of Eligibility (EPE) starts on the month following the ninth month of trial work. It is a 36 month (three year) period during which a SSDI beneficiary can receive a check from the Social Security system for any month in which their earnings are less than the SGA amount of $500. If a person earns less than SGA, he or she will receive the full social security payment amount. Any month a person earns over SGA, he or she is not eligible for a check. Should those earnings decrease to less than SGA, he or she can receive a check without reapplying if social security is informed of the changes in income level.

## Joe's Work History & Trial Work Periods

TWP Calculation

| Date | SSDI Amount | Earnings Record | TWP Months |
|---|---|---|---|
| Jan 1990 | $660.00 | $ .00 | No TWP Used |
| Feb 1990 | 660.00 | 1000.00 | 1 TWP Used |
| Mar 1990 | 660.00 | 1000.00 | 1 TWP Used |
| Apr 1990 | 660.00 | 1000.00 | 1 TWP Used |
| May 1990 | 660.00 | 1000.00 | 1 TWP Used |
| Jun 1990 | 660.00 | 1000.00 | 1 TWP Used |
| Jul 1990 | 660.00 | 1000.00 | 1 TWP Used |
| Aug 1990 | 660.00 | Not working | No TWP Used |
| Sep 1990 | 660.00 | Not working | No TWP Used |
| Oct 1990 | 660.00 | Not working | No TWP Used |
| Nov 1990 | 660.00 | Not working | No TWP Used |
| Dec 1990 | 660.00 | Not working | No TWP Used |
| Jan 1991 | 660.00 | 150.00 | No TWP (Under $200 Threshold) |
| Feb 1991 | 660.00 | 150.00 | No TWP (Under $200 Threshold) |
| Mar 1991 | 660.00 | 150.00 | No TWP (Under $200 Threshold) |
| Apr 1991 | 660.00 | 150.00 | No TWP (Under $200 Threshold) |
| May 1991 | 660.00 | 150.00 | No TWP (Under $200 Threshold) |
| Jun 1991 | 660.00 | 150.00 | No TWP (Under $200 Threshold) |
| Jul 1991 | 660.00 | 600.00 | 1 TWP Used |
| Aug 1991 | 660.00 | 600.00 | 1 TWP Used |
| Sep 1991 | 660.00 | 600.00 | 1 TWP Used |

Consistency and accuracy in reporting monthly fluctuations in earnings between SGA and non-SGA levels is critical in avoiding overpayment or underpayment of SSDI benefits during this period (APSE SSA Manual 1990).

Referring back to Joe's work history, October 1991 was his first month in EPE which will last three years regardless of his earnings. EPE is determined by a time period not an earnings record so add three years to October 1991 to determine that Joe's EPE will end in October 1994 (if he remains medically disabled).

Joe works for the same company for October, November and December 1991 and January, February and March 1992. He continues earning $600, which is over SGA, so he does not receive a SSDI check. However, in April he is hit by a car and is in traction in the hospital for April, May, June and July 1992. He calls his service representative and his benefits are reinstated simply because he reports that he is not working. The EPE continues as it is based on a time period.

In August 1992 he returns to work but only part-time and he makes $250 a month so his SSDI benefit continues as he is making less than SGA. He continues earning $250 a month until August 1993 when he quits working. His SSDI benefit continues and the timeline on his EPE is still in effect. In August 1994 he returns to work and earns $450 and continues to get his SSDI payment. In September of 1994 he earns $800 so he is over SGA and is not eligible for his SSDI payment. In October 1994 he earns $450 which is under SGA so he can receive a SSDI check.

The first month Joe earns more than SGA after the 36 months is his last month in EPE. If Joe continues to earn under SGA ($500), he will continue to receive his check (as long as he remains medically disabled), but the first month he earns over SGA he will lose his payment and he will have to reapply for benefits if his earnings fall below SGA. The EPE that allowed Joe to receive a check without reapplying for benefits if his earnings are under SGA is not in effect after October 1994. In November Joe earns $450 and is eligible for a check but in December he earns $800. His SSDI benefits cease. In March 1995 Joe quits his job and calls his service representative. She tells him he must come back to the office to reapply for benefits.

## Joe's Work History & Extended Period of Eligibility

| Date | Earnings Record | SSDI Payment Starts While in EPE |
|---|---|---|
| Oct 1991 | $600.00 | No Payment - Earnings over SGA |
| Nov 1991 | 600.00 | No Payment - Earnings over SGA |
| Dec 1991 | 600.00 | No Payment - Earnings over SGA |
| Jan 1992 | 600.00 | No Payment - Earnings over SGA |
| Feb 1992 | 600.00 | No Payment - Earnings over SGA |
| Mar 1992 | 600.00 | No Payment - Earnings over SGA |
| Apr 1992 | .00 | Receives SSDI - No Earnings |
| May 1992 | .00 | Receives SSDI - No Earnings |
| Jun 1992 | .00 | Receives SSDI - No Earnings |
| Jul 1992 | .00 | Receives SSDI - No Earnings |
| Aug 1992 | 200.00 | Receives SSDI - Earnings under SGA |
| Sep 1992 | 250.00 | Receives SSDI - Earnings under SGA |
| Oct 1992 | 250.00 | Receives SSDI - Earnings under SGA |
| Nov 1992 | 250.00 | Receives SSDI - Earnings under SGA |
| Dec 1992 | 250.00 | Receives SSDI - Earnings under SGA |
| Jan 1993 | 250.00 | Receives SSDI - Earnings under SGA |
| Feb 1993 | 250.00 | Receives SSDI - Earnings under SGA |
| Mar 1993 | 250.00 | Receives SSDI - Earnings under SGA |
| Apr 1993 | 250.00 | Receives SSDI - Earnings under SGA |
| May 1993 | 250.00 | Receives SSDI - Earnings under SGA |
| Jun 1993 | 250.00 | Receives SSDI - Earnings under SGA |
| Jul 1993 | 250.00 | Receives SSDI - Earnings under SGA |
| Aug 1993 | 250.00 | Receives SSDI - Earnings under SGA |
| Sep 1993 | .00 | Receives SSDI - No Earnings |
| Oct 1993 | .00 | Receives SSDI - No Earnings |
| Nov 1993 | .00 | Receives SSDI - No Earnings |
| Dec 1993 | .00 | Receives SSDI - No Earnings |
| Jan 1994 | .00 | Receives SSDI - No Earnings |
| Feb 1994 | .00 | Receives SSDI - No Earnings |
| Mar 1994 | .00 | Receives SSDI - No Earnings |
| Apr 1994 | .00 | Receives SSDI - No Earnings |
| May 1994 | .00 | Receives SSDI - No Earnings |
| Jun 1994 | .00 | Receives SSDI - No Earnings |
| Jul 1994 | .00 | Receives SSDI - No Earnings |
| Aug 1994 | 450.00 | Receives SSDI - Earnings Under SGA |
| Sep 1994 | 800.00 | No SSDI - Earnings over SGA |
| Oct 1994 | 450.00 | Receives SSDI - Earnings under SGA |

IRWE

The third work incentive for the SSDI system is Impairment Related Work Expense (IRWE). IRWE applies to both the SSDI and SSI system. IRWE is designed to ensure that costs are specific to work and are also a function of the disability. These costs are subtracted before SGA is determined and may keep an SSDI beneficiary's earnings below SGA which may keep him eligible for monthly benefits.

For an IRWE to be allowable:

1. The expenses must be directly related to enabling the individual to work when such expenses are not generally required by nondisabled individuals.

2. The cost must be paid by the individual and not be reimbursable from other sources.

3. The expense must be paid in a month in which the individual is or was working.

4. The expense must be reasonable. (Examples of allowable and non-allowable IRWE's are listed in the tables at the end of this section).

SSI

Unlike the SSDI system, the SSI system is not administered like an insurance program, but is related to the concept of welfare. It was established to ensure that aged or people with disabilities who have income less than the poverty guideline or Federal Benefit Rate (FBR) can receive a monthly check and Medicaid card regardless of their earnings record. It was originally designed to establish a minimum standard of living for eligible aged or people with disabilities. Therefore, when earnings are received, the SSI system is using those earnings to help offset the payments from society. The benefit amounts fluctuate depending on the amount of earnings or other income. (We will examine those formulas in detail later in this section.)

The SGA definition and level is the same for SSDI and SSI and is set at $500 as of January 1990. However, it is used only to determine income eligibility for SSI purposes. Congress can change the SGA level. (Job coaches can check with their local Social Security office to verify FBR rates and SGA rates).

To be eligible for SSI people with disabilities must:

1. Be a citizen of the U.S. or admitted legally.

2. Have little or no income or resources.

3. Be medically disabled or blind as determined by the Disability Determination Bureau (DDB) (or by an appeals process , e.g., an administrative law judge or district court) on the initial application, or during a continuing disability review.

4. Initially not be working or working but earning less than the substantial gainful activity level. Once on the rolls, work activity does not affect the individual's continuing disability status. Work activity never affects the status of individuals who are blind (APSE SSA Manual, 1990).

Effective July 1, 1987 there were major revisions in how work activity affects a person's SSI payment while the person remains medically disabled. The amount of payment is based solely on countable income and resources. The reduction from earnings is based on the amount earned. In order to help a person determine the amount of his benefit check after he starts work the job coach must ensure that he knows exactly what amount the worker is receiving and what other income is affecting their SSI benefit amount such as SSDI or the Veterans Administration (VA). All income, and sometimes in-kind income such as residential status, affects a person's benefit amount. The job coach cannot assume that everyone is receiving a standard check amount.

If a person is determined eligible for SSI because of a disability, the next variable that will be used to calculate the benefit amount is any income or in-kind support that helps a person maintain a standard of living at the poverty guideline or FBR. It is important to understand the following in order to become comfortable in calculating the affect of work on SSI payments.

DEFINITIONS

Unearned Income - any income into the household that is not the result of work. It could be a gift, a SSDI payment, a VA payment, etc.

Earned Income - any income into the household that is a result of having worked or earned money.

Disregard - the social security system will disregard some income in determining the person's SSI payment. $20 is disregarded from unearned income and $65 from earned income. If a person has no unearned income and has not used their $20 unearned income disregard, the social security system will allow them to use both the $20 unearned income disregard and the $65 earned income disregard towards their earnings. The maximum allowable for total monthly disregards is $85. A person can never use the $20 for both unearned and earned income. If someone has unearned income, the $20 disregard will be applied to the unearned income on the payment amount and it will not be available for use towards earnings).

Countable Unearned Income - The amount of money remaining after the disregards are applied from any source of unearned income. This is the amount of income the social security system will use to determine the SSI payment. This income amount will be subtracted from the maximum amount the person would be eligible for without that income.

Countable Earned Income - The amount of money remaining after disregards are applied to income from work. This is the amount the social security system will use to determine the SSI payment. This income amount will be subtracted from the amount a person would be eligible for without earned income.

In order to evaluate a person's monthly check, first, know the maximum FBR for which they are eligible. There are four different rates: 1) living in the household of another 2) living independently, 3) being married and living independently or 4) being married and living in the household of another. For illustration purposes, examples will include a single person who is responsible for his own household. The FBR for 1991 is $407. (The principle is the same for other living arrangements but they have a different FBR. The FBR is changed by Congress and should be updated yearly).

Second, the job coach must apply the appropriate disregards to earned and unearned income and subtract the remainder from the FBR. He should remember to calculate the disregards for countable unearned income before calculating the disregards for earned income if a person has both sources of income.

Example 1: Sally is single and lives independently. She is moderately retarded. She receives $386 a month from SSI which is the FBR.

Variation #1 - Her father retires and she is eligible for $150 SSDI payment from his work record.

1. $150.00 SSDI payment
   -20.00 unearned income disregard
   $130.00 countable unearned income

2. $386.00 FBR
   130.00 countable unearned income
   $256.00 SSI payment

3. Income into household
   $150.00 SSDI payment
   256.00 SSI payment
   $406.00 total income into household

Variation #2 - Sally receives $386 a month, and her father has not yet retired. Sally earns $400 a month. Earnings have a $65 disregard subtracted, then a $20 disregard subtracted as there is no unearned income into the household. The remainder is divided by two which leaves the countable earned income that reduces the SSI amount.

1. $400.00
   -65.00 earned income disregard
   $335.00
   -20.00 unearned income disregard (applied here because
   $315.00 there is no other unearned income)

2. $315.00 divided by 2 = $157.50 is countable earned income

3. $386.00
   -157.50 countable earned income
   $228.50 SSI payment amount

4. Income into household

   $400.00 wages
   228.50 SSI amount
   $628.50 total income

Variation #3 - Sally is working and making $400 per month. Her father retires and she starts receiving $150 SSDI.

1. $150.00 SSDI
   20.00 unearned income disregard
   $130.00 countable unearned income

2. $400.00 wages
   -65.00 earned income disregard
   $335.00
   0 unearned income disregard (used for unearned income in 1.)
   $335.00 divided by 2 = $167.50 is countable earned income

3. $386.00 FBR
   -130.00 countable unearned income
   $256.00 adjusted SSI payment due to unearned income

   $256.00 adjusted SSI payment
   -167.50 countable earned income
   $ 88.50 adjusted SSI amount due to both unearned and earned income

4. Income into household
$150.00 SSDI
400.00 wages
88.00 SSI
$638.50 total monthly income

**Variation #4** - Sally gets a raise to $600 a month and her father is still retired. She still receives $150 SSDI

1. $150.00 unearned income
-20.00 unearned income disregard
$130.00 countable unearned income

2. Wages
$600.00 wages
-65.00 earned income disregard
$535.00
- 0 unearned income disregard (used for unearned income in #1)
$535.00 divided by 2 = $267.50 countable earned income

3. $386.00 federal benefit rate
-130.00 countable unearned income
$256.00 adjusted SSI amount because of unearned income

$256.00 eligible SSI payment before work
-267.50 countable earned income
0

Sally is not eligible for a SSI cash payment because of the combination of unearned and earned income. However, she could retain her medicaid card under a section of the law called 1619(b). (Please refer to Page 236 for eligibility requirements for 1619(b).

4. Total income - Sally

$600.00 work
150.00 SSDI
$750.00 total income plus a Medicaid card

There are sample worksheets attached to the back of this section to assist in figuring SSI cash payment amounts.

1619(a) is the provision of the law that allows cash payments to continue based on the previous formula without worrying about SGA levels. It only applies to income into a household that results from work.

1619(b) is a provision of the law that allows working people in certain circumstances to continue to receive their medicaid card even if they are not eligible for a cash payment.

The attached table at the end of this section should be reviewed to understand these provisions more completely.

An IRWE is the same by definition for SSDI as it is for SSI. However, if an IRWE is claimed it will affect the payment as if it is another disregard. Assume Sally has the $150 SSDI and the $600 earning. Now she is claiming and is allowed a $50 IRWE because of additional expenses she has to pay for transportation because she cannot drive.

1. $150.00 SSDI
   -20.00 disregard
   $130.00 adjusted SSI because of unearned income

2. $600.00
   -50.00 IRWE
   $550.00
   -65.00 earned income disregard
   $485.00 divided by 2 = $242.50 is the countable earned income

3. $386.00 Federal Benefit Rate
   -130.00 countable unearned income
   $256.00 adjusted SSI

4. $256.00 SSI adjusted from unearned income
   242.50 countable earned income
   $ 13.50 SSI payment adjusted after earned and unearned income

The supported employee can send in the receipts for the expenses along with his pay stubs on a monthly basis. It is best to inform the SSA representative about the worker's desire to use an IRWE and determine if the expenses qualify for one before they send in the receipts, as they must authorize it.

A Plan To Achieve Self-Support (PASS) allows people with disabilities to set aside income or resources for an occupational goal. A PASS can help establish or maintain SSI eligibility as well as increase or maintain the SSI payment amount. A PASS can be established for education, vocational training, or purchasing support services which enable a person to work. PASS plans have been written to pay for job coach services.

The purpose of a PASS is to increase the individuals income producing capability, thus reducing reliance on government support in the long run (APSE SSA Manual, 1990). Anyone can write a PASS. It is best to make them simple and to the point. Please refer to the attached tables if you are interested in a PASS.

# SOCIAL SECURITY QUIZ

1. The Social Security and SSI system

   A. are best left to experts to understand.

   B. have a different historical and philosophical basis so they have different rules that apply to earnings.

   C. are really the same thing.

   D. do not have any safeguards for people who return to work.

2. The SSDI system has work incentives called

   A. Title XIX, EPE and 1619(b).

   B. IRWE, TWP, EPE, extended medicare.

   C. SGA, TWP and IRWE.

   D. 1619(a), PASS and TWP.

3. If a person goes to work in the SSDI system, it is not important to know their prior work history because it doesn't pertain.

   A. True.

   B. False.

4. The earning history of an individual allows the job coach to plan for

   A. the status of eligibility.

   B. the status of TWP and EPE.

   C. the amount he can earn before he looses benefits

   D. how much of a disincentive the social security representative will be.

5. The SSI system

   A. reduces benefit amounts on a prorated rate based on earnings.

   B. has not made any progress in twenty years.

   C. stands for situational symptom inducement.

   D. is guaranteed for the rest of a person's life.

6. A PASS

   A. is an explanation of why a person wants to pass a redetermination.

   B. is a plan to set aside resources that allows a person to obtain an occupational objective and achieve more independence from governmental benefits.

   C. only applies to the SSDI system.

   D. can only be completed by a VR counselor.

7. An IRWE

   A. can apply expenses back six months.

   B. can be reimbursed by VR.

   C. must be directly related to someone working, be paid by the individual, be incurred the month the person is working, and be reasonable.

   D. is very difficult to apply for.

8. To calculate the effects of earnings a job coach must

   A. be crazy.

   B. call the social security office.

   C. find the SGA and subtract it from the IRWE after calculating the PASS.

   D. use the disregards to calculate the countable earned income and any countable unearned income and then subtract the countable income sums from the FBR for which the person is eligible.

9. If a person earns over $500,

A. he or she transfers from the SSA system to the SSI system.

B. he or she is cut off of SSI immediately for the rest of his life.

C. he or she may loose SSDI benefits depending on the situation with TWP and EPE; SSI benefits will continue to be determined based on the disregards.

D. he or she receives a bonus from the President for outstanding citizenship.

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# CASE MANAGER CURRICULUM ANSWER KEY

1. The Move Toward Inclusion
   1. d 2. c 3. b 4. a 5. a 6. a 7. c 8. d 9. c

2. Values and Philosophies of Supported Employment
   1. c 2. a 3. d 4. b 5. a 6. d 7. c 8. a 9. c 10. a

3. The Quality of Community Integration
   1. d 2. b 3. c 4. d 5. c 6. b 7. c 8. a

4. The Referral Process
   1. b 2. a 3. b 4. c 5. d 6. b

5. Consumer Assessment
   1. b 2. d 3. b 4. c 5. a 6. c 7. a 8. b 9. d 10. b

6. Employment Advocacy
   1. d 2. b 3. c 4. a 5. c 6. c 7. b 8. d 9. b 10. a

7. Establishing Supportive Relationships
   1. c 2. b 3. a 4. b 5. d 6. b 7. b 8. d 9. c 10. a

8. Social Security
   1. b 2. b 3. b 4. b 5. a 6. b 7. c 8. d 9. c